# Norstar
# PRELUDE and CINPHONY ACD
# User Guide

CINTECH
Solutions

PRELUDE 3.6
CINPHONY Level I  3.6
CINPHONY Level II  3.6

*by CINTECH Solutions, Inc.*

# Table of Contents

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# Chapter 1: Overview

# What is Norstar PRELUDE and CINPHONY ACD?

Norstar PRELUDE and CINPHONY ACD is an Automatic Call Distribution system designed for use with the Norstar Applications Module and the Norstar KSU.  There are 3 ACD Levels providing a wide variety of features and functionality: PRELUDE, CINPHONY I, and CINPHONY  II.  There are also ACD Add-Ons you can utilize to further enhance the performance and productivity of all levels: Caller Directed Routing (CDR), Automated Attendant, Infocus Status Display and Reports, Wallboard, and Voice Port Activation.

# What does ACD do?

ACD performs 6 basic operations for every incoming ACD call:

◗  **Directs Call to a Group**
◗ **Checks Routing Table**
◗ **Executes Routing Commands**
◗ **Checks Group Overflow Table**
◗ **Distributes Call to Agent**
◗ **Tracks Call Data for Reports**

In Chapter 2, Configuration, call distribution directions and call processing parameters are defined for these operations.

## Directs Call to a Group

Incoming telephone lines are assigned to ACD Groups and stored in a Line Configuration Table.  For example, lines 1, 2, 3, and 4 are assigned to Group 1 and lines 5, 6, 7, and 8 are assigned to Group 2.

When an ACD call comes in on a line, ACD checks the Line Configuration Table and directs the call to the Group assigned to the line.  ACD then checks the Routing Table.

## Checks Routing Table

A Group's operating hours are stored in a Routing Hours Table.  For example, Group 1's operating hours may be 9:00 am to 5:00 pm, Monday through Friday.

ACD checks the time of day to determine whether the call should be handled by the Day Routing Command Table or the Night Routing Command Table.

## Executes Routing Commands

Day and Night Routing Command Tables direct the call through sequential commands.  Commands include:

◗  ALERT
◗  ANNOUNCEMENT
◗  AUTO ATTD
◗  AVERAGE QTIME ANNOUNCEMENT
◗  CDR TABLE
◗  DELAY ANSWER
◗  DISCONNECT
◗  DISTRIBUTE
◗  EXPECTED QTIME ANNOUNCEMENT
◗  FORCED ANNOUNCEMENT
◗  GO TO STEP
◗  GROUP
◗  INCREASE PRIORITY
◗  LINE XFER
◗  LINK XFER

◗ NO ANSWER
◗ SET PRIORITY
◗ TRANSFER TO
◗ VMAIL XFER

When the Routing Commands are configured, they are listed in the sequence (order) each call will be routed.

The following sample Day Routing Command Table delays the answering of the call for 10 seconds, plays announcement #1, distributes the call for 5 seconds, plays announcement #2, distributes the call for 15 seconds, plays announcement #3, returns to step 4, and repeats until call is answered.

| STEP | Day Command | Value |
|------|-------------|-------|
| 01 | DELAY ANSWER | 00:10 |
| 02 | ANNOUNCEMENT | 1 |
| 03 | DISTRIBUTE | 00:05 |
| 04 | ANNOUNCEMENT | 2 |
| 05 | DISTRIBUTE | 00:15 |
| 06 | ANNOUNCEMENT | 3 |
| 07 | GO TO STEP | 4 |

The following sample Night Command Routing Table forces Announcement #8 to inform the caller that business hours are over, and then disconnects the call.

| STEP | Night Command | Value |
|------|---------------|-------|
| 01 | FORCED ANNC. | 8 |
| 02 | DISCONNECT | |

## Checks Group Overflow Table

As ACD executes routing commands, it also tracks how many calls are waiting for the group and how long each call has been waiting in the queue. You can specify overflow thresholds so that when too many calls are received by a Group, or calls have remained too long in the queue, they can be distributed to Overflow Group(s). When overflow is occurring, Agents in original Group or Overflow Group(s) can receive the call.

## Distributes Call to Agent

ACD monitors the activity of each Agent in each Group. When a call comes in, it is directed by a routing command to an Agent. If only one Agent is available, ACD sends the call to that Agent; however, if more than one Agent is available, ACD refers to the Group's Agent Selection method. There are 3 Agent Selection methods:

◗ LONGEST IDLE - selects Agent who has been available for the longest time since last handling a call.
◗ ROUND ROBIN - selects first available Agent listed after the Agent handling the last call.
◗ TOP DOWN - selects available Agent starting at top of list.

## Tracks Call Data for Reports

ACD monitors system and Agent performance by tracking the following:

◗ The number of incoming calls on each line.
◗ The length of time each call spends in queue.
◗ The number of calls answered by Agents or abandoned by callers before they are answered.
◗ The amount of Agent time spent on various ACD activities.
◗ The number of requests for a Supervisor's assistance.

Refer to the Reports Chapter for a description of the System, Group, and Agent Reports.

# How do you navigate through ACD Menus and Screens?

ACD opens to a Main Menu.

```
01/02/00  11:20:47 am          CINPHONY (123456)            7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                   Agent
                   Group
                   Line
                   Supervisor
                   Emergency

                   Recorded Announcement
                   Voice Ports
                   Call Categorization

                   System Wide Parameters
                   Update Configuration

                   Menu Password
                   Printer
                   Wallboard
                   Infocus Status Display


   Press ENTER/CLICK to display Agent Configuration screen
```

*Example*

On this menu you can select 1 of 6 menu options.  After selecting a menu option, either a menu or a screen will display.

```
01/02/99  11:22:11 am          CINPHONY (123456)            7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

         Agent
                         Group Configuration
     Group Number                                        Save
     Description
     Name on Station Set                                 Delete

     Transfer DN                                         Copy
     Wrap Type                    Duration    :
     Auto-Logout Duration      00:00                     Exit
     Prompt Categorization     NO  (J)   YES ( )
     Priority                  0
     T.S.F Interval              (min)   Threshold    (secs)
     Unavailable Duration      00:00


       Routing  ▶    Agent Selection ▶   Overflow Group ▶



   Type in up to 2 numbers, or press F2/DBL CLICK and select Group from list
```

*Example*

When the screen displays, you will complete the required or optional field information by either:

◗ Selecting an item from a list.

◗ Typing characters and/or numbers in the field.

◗ Selecting a YES/NO field.

Once field information is complete, you can simply and quickly perform functions such as Save, Delete, Exit, etc.

Behind some screens there are subscreens where more information is required.

```
┌──────────────────── Routing for Group 1 CUSTOMER SUPPORT ────────────────┐
│                                                                          │
│   ┌Routing Hours┐  ┌──────Day Routing──────┐ ┌─────Night Routing─────┐   │
│   Day │ Start   End │ Step    Command      Value │ Command       Value │   │
│                                                                          │
│   SUN │ 00:00 - 00:00 │  1   DELAY ANSWER - 00:10  FORCED ANNC. - 8       │
│   MON │ 08:00 - 17:00 │  2   ANNOUNCEMENT - 1      DISCONNECT    -        │
│   TUE │ 08:00 - 17:00 │  3   DISTRIBUTE   - 00:20                -        │
│   WED │ 08:00 - 17:00 │  4   ANNOUNCEMENT - 2                    -        │
│   THU │ 08:00 - 17:00 │  5   DISTRIBUTE   - 00:15                -        │
│   FRI │ 08:00 - 17:00 │  6   ANNOUNCEMENT - 3                    -        │
│   SAT │ 00:00 - 00:00 │  7   GO TO STEP   - 04                   -        │
│                          8                 -                    -        │
│                          9                 -                    -        │
│                         10                 -                    -        │
│                         11                 -                    -        │
│                         12                 -                    -        │
│                         13                 -                    -        │
│                         14                 -                    -        │
│                         15                 -                    -        │
│   OK         Cancel     16                 -                    -        │
│                                                                          │
│   ████████████████████████████████████████████████████████████          │
│   Type in Start Time using the format HH:MM (range 00:00-24:00)          │
└──────────────────────────────────────────────────────────────────────────┘
```

*Example*

Once completing the subscreen fields, you can easily and quickly return to the previous screen, option menus, or to the Main Menu.

## Main Menu Options

There are 6 Main Menu Options:

◗ **Status Menu**

◗ **Configuration Menu**

◗ **Reports Menu**

◗ **Maintenance Menu**

◗ **ACD Control**

◗ **DOS-Shell**

### *Status Display Menu*

Once ACD is configured and calls are being distributed properly, the Status Display Menu becomes useful to you in viewing up-to-the-second information about current call processing activities over all groups in the system, or a single group.  When you select this option from Main Menu, a screen displays with 4 choices:

◗ System Status Display - view performance of all Groups.

◗ Group Status Display - view performance of one Group.

◗ Feature Codes - these 3-digit codes range from a numerical value of 900 to 999.  They perform specific functions from your Station Set.  Typical feature code functions include: logging in, going unavailable, requesting help, and canceling wrap. *Refer to Chapter 3, Using Norstar Station Sets, to use these codes to perform Agent and Supervisor Functions.*

◗ About ACD - displays important application information such as: Level, Version, Product ID, Authorized Voice Ports, Add-Ons in use, and copyright notice.

## *Configuration Menu*

Configuring your system completes the installation process. The Configuration screens enable you to add, edit, and save the required and optional parameters you want to set for the system. This customization of database records meets the needs of your call center while establishing the information you want to see on the call reports. When you select this option on the Main Menu, a screen will display with 14 choices:

◗ **Agent   (required)**

◗ **Group   (required)**

◗ **Line (required)**

◗ **Supervisor   (required)**

◗ **Emergency Group**

◗ **Recorded Announcements**

◗ **Voice Ports**

◗ **Call Categorization**

◗ **System Wide Parameters**

◗ **Update Configuration**

◗ **Menu Password**

◗ **Printer**

◗ **Wallboard**

◗ **Infocus Status Display**

Refer to Chapter 2, Configuration, and follow the steps to configure these options.

## *Reports Menu*

As ACD handles incoming calls, it is also collecting data for reporting purposes. The data collected includes:

◗ **Agent/Group Data:**

- The amount of logged-in time for each Agent, and how that time was spent.
- How many times the Agent requested a Supervisor's help.
- How the Agent performed within a Group.
- How many calls overflowed, and where they were sent.
- The number of calls answered or abandoned.
- The average time a call remained in queue before it was answered or abandoned.
- The total calls for the group.

◗ **System Data:**

- The number, time, duration, and type (ACD and non-ACD) of calls received on each line.
- The average length of time calls remained in queue.
- The time, number, duration, and percentage of time lines were busy.
- The number, time, duration of calls received on specific lines, and if the call was abandoned.

Refer to Chapter 5, Reports, to perform the steps to generate a report and for a brief description of each report.

Also included in this menu are 3 operations to enhance Report generation:

◗ **Scheduler** - schedule Reports, Process Data, and Purge Data.

◗ **Process Data** - process up-to-date information for Report generation.

◗ **Report/File Maintenance** - copy, move, print, or view Reports generated to File, data Exported to File, or Announcements saved to file.

## System Maintenance Menu

This menu allows you to manage the data stored in the database.

There are 7 System Maintenance operations:

◗ **Archive Data** - copies current database records to floppy disks for backup or later restoration.

◗ **Archive and Purge Data** - copies current database records to floppy disks and deletes the original records from the database.

◗ **Purge Data** - deletes records from the database for a specified time period.

◗ **Restore Archived Data** - copies previously archived data from floppy disks back into the database on the Applications Module.

◗ **Export Data** - creates export files containing quote-delimited fields separated by commas from ACD databases. Export data contains ACD Call Data based on the ACD Call, Agent, Busy, and Category reporting information.

◗ **Recorded Calls** - displays the Agent ID, call #, date, and time of each recorded call and allows you to delete the recorded call.

◗ **Data Management Parameters** - automatically processes and purges call data on a daily basis and allows you to set a data storage period for historical call data.

Refer to Chapter 6, Maintenance for directions to perform these operations.

## ACD Control

This menu allows you to perform the following operations:

◗ **Activate** - select this operation to restart Call Processing after it has been deactivated. When selected, the Main Menu will display and you can continue to use ACD.

◗ **Deactivate** - select this operation to stop Call Processing so you can execute an Add-On install, Upgrade install, Update install, or shut the system down.

◗ **Execute** - after you have selected Deactivate, you can select this operation to install an Add-On, Upgrade, or Update. When completed with the install, Call Processing will automatically be activated.

◗ **Off-Line** - select this operation to start ACD without starting Call Processing. You can perform the following without being connected to the KSU: Configure, Generate Reports, Modify Scheduler, and perform any function not requiring active Call Processing.

◗ **Return** - select this option to exit the ACD Control screen and return to the Main Menu.

◗ **Shutdown** - select this operation to stop all running programs on the system and power off the Application Module. A Shutdown would be necessary, for example, if you wanted to move the Applications Module to a different location or install a DVC or MS-BIC.

## DOS-Shell

Enables you to exit ACD but continue Call Processing activity. When you select this option, the CINPHONY DOS prompt will display - C:\CINPHONY>. To return to the ACD Control screen, you will need to type in the word EXIT at this prompt and press ENTER.

## Keyboard Use Tables

The following tables list and describes the **Function and Special Keys**, **Cursor Movement Keys**, and **Editing Keys** you will use.

| Function and Special Keys | Description |
|---|---|
| F1/CLICK RIGHT | displays a Help screen for highlighted field.  ALT-F1 displays full screen help |
| F1/CLICK RIGHT FROM HELP SCREEN | displays a keyboard help screen |
| F2/DBL CLICK | displays a choice list where you can select an item |
| F10 or ALT-S | saves information or performs the main operation for a screen (e.g., Run Report - ALT-R).  In Configuration, the saved information is also saved in the ACD Configuration Directory |
| ESC or ALT-X | exits to previous screen or menu |
| ENTER/CLICK | selects field, function, menu item, and list item |
| LEFT/RIGHT ARROW | moves checkmark between YES and NO fields |
| ALT | when used in conjunction with a highlighted letter on the function to be performed, it selects the function (e.g., ALT-S for Save, ALT-X for Exit) |
| PUSH BUTTONS (Save, Exit, Delete, OK, Cancel, etc.) | by selecting a push button on the screen (highlight and press ENTER, or CLICK on button), you can perform the operation designated on the button |

| Cursor Movement Keys | Description |
|---|---|
| ENTER | moves cursor to next field |
| TAB | moves cursor to next field |
| SHIFT TAB | moves cursor to previous field |
| RIGHT/LEFT ARROWS | moves cursor right/left one character in field, or to next/previous field.  Also moves checkmark to check box option on screen |
| DOWN/UP ARROWS | moves cursor down/up one field |
| HOME/END | moves cursor to first/last field on screen |
| CLICK | click left Mouse button on field you want to highlight |
| SCROLL BAR | located on right border of screens (vertical) and along bottom  (horizontal).  You can use the Scroll Bar with the Mouse left button for Help screens, Report screens, lists with over 5 choices, and scroll regions |

| Editing Keys | Description |
|---|---|
| DEL | deletes character above cursor in a field |
| BACKSPACE | deletes character to left of cursor in a field |
| F6 | deletes all characters right of cursor to end of a field |
| F5 | deletes all characters in a field (clear field) |
| INS ON/OFF | inserts character in field to left of cursor position in field, or types over character in field |

# How to Enter ACD?

It is assumed that the Applications Module has been connected properly to the Norstar KSU, all ACD Hardware and Software has been installed, and the appropriate Verification Key has been entered.

Follow these steps to enter ACD to the Main Menu if Applications Module has been turned off:

1   Turn **ON Norstar Applications Module** by plugging in power cord.

2   Turn **ON SVGA Monitor**.

3   Turn **ON Printer** if connected.

4   When the **OS/2 Desktop** displays, click on **Window List**.

5   Click on **ACD MASTR**.

In a few moments the ACD Main Menu will display.  If this is the first time entering ACD, go to the Configuration Chapter and configure Agent, Group, Supervisor, and Lines to ensure proper operation.

# What is the ACD Security Key?

This Input/Output Device is attached to the end of the Printer Cable and is connected to the Applications Module's  Parallel Printer Port.  It validates the current ACD Version and ACD Add-Ons currently in use.  If you turn on or reboot ACD and you receive an error message: **Invalid Product ID, Invalid Verification Key,** or **Security Key Not Found**, check the Security Key to make sure of a proper connection.

# What are the differences in the ACD Levels?

This table lists the differences in the capacities, features, and reports among PRELUDE, CINPHONY I, and CINPHONY II levels.

| Capacities | PRELUDE | CINPHONY I | CINPHONY II |
|---|---|---|---|
| # Active Agents | 15 | 30 | 80 |
| # Agent IDs | 60 | 120 | 240 |
| # Groups | 3 | 6 | 80 |
| # Voice Ports Enabled* | 4 | 8 | 12 |
| # Overflow Levels | 1 | 3 | 8 |
| Simultaneous Announcements | # of ACD Voice Ports | # of ACD Voice Ports | # of ACD Voice Ports |
| Recorded Announcements | 240 | 240 | 240 |
| Rec. Announcements with Automated Attendant | 240 | 240 | 240 |
| Maximum Installed Voice Ports | 32 | 32 | 32 |
| Steps in Routing Table | 8 | 16 | 16 |
| Routing Tables per Group | 2 | 2 | 2 |
| Emergency Routing Groups | | 1 | 1 |
| Registered Supervisors per Group | | 1 | 1 |
| # Lines | 30 | 80 | 120 (with MICS 4.x, 144 lines) |
| **Features** | | | |
| Agent HELP | No | Yes | Yes |
| Alert | No | Yes | Yes |
| Priority Queuing | No | Yes | Yes |
| Silent Monitor | No | Yes | Yes |
| Agent Record Call | No | Yes | Yes |
| Data Export | No | Yes | Yes |
| DID/DNIS/Target Line Support | Yes | Yes | Yes |
| Emergency Routing | No | Yes | Yes |
| **Reports** | | | |
| Destination Number Report | No | Yes | Yes |

*Note: All ACD levels can be expanded via Voice Port Activation Add-On to a maximum of 32 voice channels.*

# Chapter 2: Configuration

# Introduction

You will use this menu's screens to complete the installation process.  The Configuration screens allow you to add, edit, and save the parameters you want to set for the system.  When you select this option on the Main Menu, a screen will display with 14 choices (required and optional configurations).  The following flow charts display the fields where you can enter, mark, or select the information required to complete the configuration for each screen and subscreen:

| **Agent Configuration** | **Agent ID** |
| --- | --- |
| | **Agent Name** |
| | **Password** |
| | **Answer Forcing** |
| | **Call on Demand** |

| Save |
| --- |
| Delete |

| Update Configuration |
| --- |

**Group Configuration**

- **Group Number**
- **Group Description**
- **Name on Station Set**
- **Transfer DN**
- **Wrap Type**
- **Auto Logout / Duration**
- **Prompted Categorization**
- **Telephone Service Factor**
- **Priority**
- **Unavailable Duration**

Save
Copy
Delete

Update Configuration

**Routing Table subscreen**

- **Day & Night Routing Hours**
- **Routing Commands/Values**

**Agent Selection subscreen**

- **Method of Selection**
- **Agent Selection for Group**

**Overflow Group subscreen**

- **Group**
- **Calls (maximum in queue)**
- **Time (max length in queue)**

**Route Order Configuration**

**Line Configuration**

**Line, Orig., Dest., Orig/Dest, or Dest/Orig**

| Line Number |
| Description |
| Routing |
| Group |
| Priority |
| Delay |

| Update Configuration |
| Save |

**Destination Number (DNIS/DID) Configuration**

| Save |
| Update Configuration |

| DNIS/DID Number |
| Description |
| Group |
| Routing |
| Priority |

**Originating Number (ANI/ICLID) Configuration**

| Save |
| Update Configuration |

| ANI/ICLID Number |
| Description |
| Routing |
| Group |
| Priority |

**Caller Directed Routing (CDR) Configuration**

| Save |
| Update Configuration |
| Import |

| CDR Table Number |
| Description |
| Group |
| Priority |

**Emergency Configuration**

Group Number

Group Description

Password

Save
Delete

Update
Configuration

---

**Supervisor Configuration**

Supervisor ID

Supervisor Name

Password

Group Assignment

Save
Delete

Update
Configuration

---

**Voice Port Configuration**

Record Call
Reserve Ports

Save

Reconfigure

---

**Recorded Announcement Configuration**

Description

Save

## Call Categorization Configuration

- Call Categorization Number
- Call Categorization Description

Save
Delete

## Menu Password Configuration

- Configuration
- Reports
- Maintenance
- ACD Control
- DOS-Shell

Save

## System Wide Parameters Configuration

- PRI/ICLID Delay Time
- Backup Station Set DN
- Login / Logout DN (Analog Station Set)
- Available / Unavailable DN (Analog Station Set)
- Indicator FlashRate 1 & 2
- Digit Timeout / Port Timeout (Automated Attendant)
- Display on Station Set

Save

## Printer Configuration

- Printer Port
- Printer Name
- Page Length
- Form Feed
- Condensed Print Codes
- Normal Print Codes

Save

```
┌─────────────────────────────┐        ┌─────────────────────────────┐
│ Infocus **Status Display**  │────────│        Baud Rate            │
│       **Configuration**     │        │       (COM only)            │
└─────────────────────────────┘        ├─────────────────────────────┤
          ┌──────────┐                  │        COM Port             │
          │   Save   │                  │       (COM only)            │
          └──────────┘                  ├─────────────────────────────┤
                                         │    Dynamic Data Rate        │
                                         │     (COM or LAN)            │
                                         ├─────────────────────────────┤
                                         │     Config Data Rate        │
                                         │     (COM or LAN)            │
                                         ├─────────────────────────────┤
                                         │     Name/IP Address         │
                                         │       (LAN only)            │
                                         ├─────────────────────────────┤
                                         │   TCP/IP Port Number        │
                                         │       (LAN only)            │
                                         └─────────────────────────────┘
┌─────────────────────────────┐        ┌─────────────────────────────┐
│ **Wallboard Configuration** │────────│     Model and Format        │
└─────────────────────────────┘        ├─────────────────────────────┤
          ┌──────────┐                  │     System Statistics       │
          │   Save   │                  ├─────────────────────────────┤
          └──────────┘                  │     Group Statistics        │
                                         ├─────────────────────────────┤
                                         │     Display Duration        │
                                         └─────────────────────────────┘

┌─────────────────────────────┐        ┌─────────────────────────────┐
│  **Update Configuration**   │────────│     Activate Changes        │
└─────────────────────────────┘        ├─────────────────────────────┤
                                         │     Schedule Changes        │
          ┌──────────────┐              └─────────────────────────────┘
          │ Schedule Date │
          ├──────────────┤
          │ Schedule Time │
          └──────────────┘
```
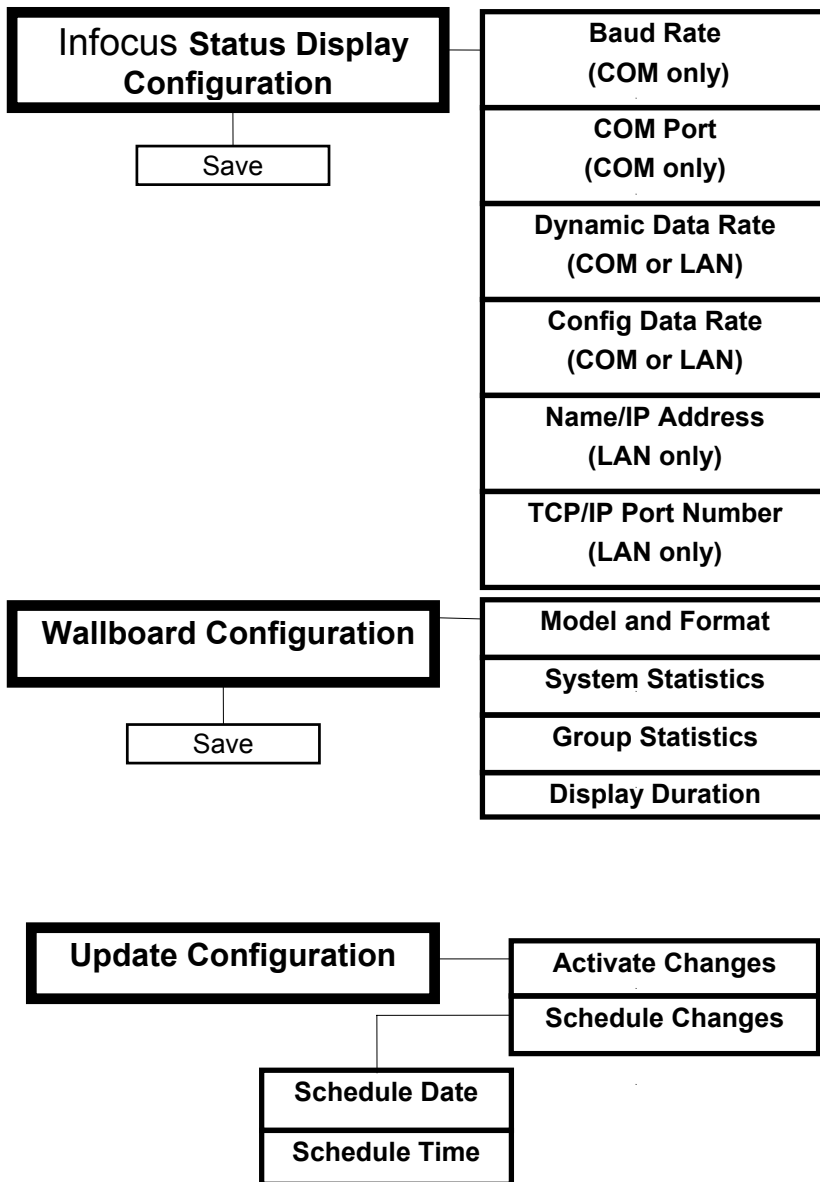
# Configuration Directory

A Configuration Directory (C:\CINPHONY\DATBAK) is setup to store all configurations made by you.  As soon as a Configuration screen is updated or edited and the information is saved, ACD automatically copies this information into the directory.  You can copy these configurations saved as .DAT files onto a floppy disk by following these steps:

- Select DOS-Shell on the ACD Main Menu.  The CINPHONY Directory prompt will display - C:\CINPHONY>
- Change to the DATBAK Directory (C:\CINPHONY\DATBAK>).
- Insert a floppy disk in the Application Module's A: Drive.
- Copy all .DAT files from the DATBAK Directory onto the floppy.

    C:\CINPHONY\DATBAK>copy *.dat a: ↵.

If the ACD software malfunctions for any reason, or if there is any problem causing ACD to become unavailable, it may be necessary to reconfigure the system. If so, the Configuration Directory contains all vital information to Configure the system quickly and accurately.

If the Applications Module is connected via LAN to an Infocus Server PC, a program called Data Retrieval is provided on the Infocus Installations CD-ROM that enables you to retrieve the contents of the DATBAK directory from the Infocus Server or Client PC to the hard disk or a floppy disk. Refer to the Infocus Installation and User Guide for details.

## Update Configuration

This utility allows you to complete the configuration process for changes made on **Agent**, **Group**, **Line**, **Supervisor**, and **Emergency Configuration** screens.

After changes are saved on a Configuration screen, you will be returned to the Configuration Menu.

```
01/02/00  11:20:47 am        CINPHONY (123456)            7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                   Agent
                   Group
                   Line
                   Supervisor
                   Emergency

                   Recorded Announcement
                   Voice Ports
                   Call Categorization

                   System Wide Parameters
                   Update Configuration

                   Menu Password
                   Printer
                   Wallboard
                   Infocus Status Display



 Press ENTER/CLICK to display Agent Configuration screen
```

In this section steps are provided so you can perform the following tasks:

- ❯ Activate updates to configuration immediately.
- ❯ Schedule updates to configuration to occur at a later time.

Follow these steps to **activate updates to configuration**:

**1** On the Configuration Menu, highlight **Update Configuration** and press **ENTER/CLICK**. The Update Configuration screen will display.

```
┌──────────────────────────────────────────────────────────────────────┐
│ 01/08/00    9:15:51 am         CINPHONY (112233)          19% Disk Full │
│                                                                          │
│   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell │
│              ┌──────────────┐                                            │
│              │ Agent        │                                           █ │
│              │ Group        │                                           █ │
│              │ Line         │                                           █ │
│       ┌──────────────── Update Configuration ──────────────┐            │
│       │                                          Exit       │            │
│       │                              ┌───────────────────┐              │
│       │   Last Reconfigured :        │ 01/05/00   03:02 pm │             │
│       │                              └───────────────────┘              │
│       │                                                                 │
│       │   Activate Changes              Schedule Changes                │
│       │                                                                 │
│       └─────────────────────────────────────────────────────┘          │
│              │ Menu Password  │                                         │
│              │ Printer        │                                         │
│              │ Wallboard      │                                         │
│              │ Infocus Status Display │                                 │
│              └────────────────┘                                         │
│                                                                          │
│ Press ENTER/CLICK to return to Configuration Menu (ESC or Alt X also exits) │
└──────────────────────────────────────────────────────────────────────┘
```

**2** Highlight **Activate Changes** button and press **ENTER/CLICK** (or press ALT-A). As changes are activated, this message will display: **Configuration changes will now take effect.**

You will be returned to the Configuration Menu.

Follow these steps to schedule updates to configuration:

**1** On the Configuration Menu, highlight **Update Configuration** and press **ENTER/CLICK**. The Update Configuration screen will display.

**2** Highlight **Schedule Changes** button and press **ENTER/CLICK** (or press ALT-S). The Schedule Date and Schedule Time screen will display.

```
01/08/00    9:21:01 am         CINPHONY (112233)              19% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                     Agent
                     Group
                     Line
                          ┌── Update Configuration ──────────────────
                          │                                  │
                          │                             Exit │
         Last Reconfigured :  │ 12/08/98      09:18 am │
                          │      ── Schedule Changes ──
         Acti │  Schedule Date    MONDAY        │  OK
              │  Schedule Time    08:00 AM       │
              │                                  │  Cancel

                     Wallboard
                     Infocus Status Display


 Press ENTER/CLICK to confirm current field edits (F10 or Alt O also confirms)
```

**Schedule Date**

**3**  Press the **F2 Key** to display list of dates.  Highlight **Date** and press **ENTER/CLICK**.  The Schedule Time field is highlighted.

**Schedule Time**

**4**  Press the **F2 Key** to display list of times.  Highlight **Time** and press **ENTER/CLICK** to select.

**5**  Press the **F10 Key** (or highlight OK and press ENTER/CLICK, or press ALT-O) to confirm the Schedule. The Configuration changes will be updated on the scheduled date and time.

You will be returned to the Configuration Menu.

*Note: if you select **Cancel**, changes will be pending activation or scheduling.  You will be returned to the Update Configuration screen.*

*While scheduled changes are pending, a message displays on the Main screen advising: "Configuration changes pending".*

# Agent Configuration

When you configure Agents first they will display in the Agent Selection choice list for each Group you configure. It would be best, therefore, to configure all Agents for all shifts before configuring Groups.

There is 1 screen with 5 fields to complete when configuring an Agent:

◗ Agent Identification Number

◗ Agent's First Name

◗ Agent's Last Name

◗ Agent's Password for ACD login

◗ Answer Forcing for Agents using headsets

◗ Call on Demand

In this section steps are provided so you can perform the following tasks:

◗ Access the Agent Configuration screen.

◗ Add an Agent.

◗ Update existing Agent information.

◗ Delete an Agent.

> *Notes: When you add an Agent to the database, most of the information you complete for identification will display on corresponding ACD screens, reports, and certain station sets.*
>
> *Once Agents have been configured, they must be assigned to Group(s) for the Agents to be able to login and receive ACD calls.*

Follow this step to access the Agent Configuration screen from the Configuration Menu:

**1** On the **Configuration Menu**, highlight **Agent** and press **ENTER/CLICK** to select. The Agent Configuration screen will display.

```
01/02/01  11:21:00 am         CINPHONY (123456)          7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control   DOS-Shell

                      Agent
                      Group
                      Line
                      Supervisor
                          ──────── Agent Configuration ────────

                      Agent ID       101            Save
                      First Name     J.
                      Last Name      HIGGINS         Delete
                      Password       12345678
                      Answer Forcing NO (J)    YES ( )   Exit
                      Call on Demand NO (J)    YES ( )


                      Printer
                      Wallboard
                      Infocus Status Display



   To edit, type in up to 15 alphanumeric characters and press ENTER/CLICK
```

Follow these steps to add an Agent to the database:

**ID #** (required field)

**1** Type in **2, 3, or 4 numeric characters** for the Agent's identification number (maximum 9999). Highlight First Name field.

*Note: For PRELUDE, you can add up to 60 Agents; for CINPHONY I, you can add up to 120 Agents; and, for CINPHONY II, you can add up to 240 Agents. For clarity, it is best to use a consistent numbering system for Agents. For example: 01, 02, 03, etc., or 001, 002, 003, etc..*

**First Name** (required field)

**2** Type in up to **15 alphanumeric characters** for Agent's first name. Highlight Last Name field.

*Note: The first initial of First name and full Last Name display on the Group Status screen, and the full First and Last Names display on Reports.*

**Last Name** (required field)

**3** Type in up to **15 alphanumeric characters** for Agent's last name. Highlight Password field (optional).

**Password** (optional field)

**4** Type in up to **8 numeric characters** for Agent's password. Highlight Answer Forcing field.

*Note: Agent must enter these digits when logging in to ACD (range 0-99999999).*

**Answer Forcing** (required field - YES/NO)

**5** Use the **Right** and **Left Arrow keys** to move checkmark to **YES** and **NO** fields.

*Note: YES - forces a call upon the Agent; a zip tone precedes the call. NO - Agent accepts call by pressing the appropriate station set key when ready. This only applies to those Agents using headsets.*

**Call on Demand**

**6** Use the **Right** and **Left Arrow keys** to move checkmark to **YES** and **NO** fields.

*Notes: YES – places an Agent in a "Perpetually Unavailable" state when the Agent logs in. The only way that an Agent can receive a call in this state is to manually press the Available programmed key on the station set. The Agent would be momentarily available to receive a call; however, when the Agent ends the call, the Agent would become Unavailable. This functionality is ideal for a Supervisor or backup Agent, for example, to retrieve calls when they are reaching capacity until the calls return to a normal distribution.*

*NO – places an Agent in an Available state when the Agent logs in.*

*Call on Demand can not be applied when using Categorization Codes or when using C3050 and C3060 Companion Portable Station Sets.*

**Save Agent** (screen function)

**7** When all screen information is complete and you are ready to add the Agent, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S). A blank Agent Configuration screen will display if you want to continue adding Agents.

**8** Press **ESC** (or highlight Exit and press ENTER/CLICK, or press ALT-X) to exit this screen.

*Note: If you want to activate these changes or schedule these changes for a later update, select Update Configuration.*

Follow these steps to update existing Agent information:

**ID #**

**1** Type the **existing Agent's Identification Number** and press **ENTER/CLICK**.

(or)

Press the **F2/DBL CLICK** to display all Agents' Identification Numbers, highlight **Agent ID** and press **ENTER/CLICK** to select.

**2** All Agent information will display on the screen. Edit any of the fields for this Agent.

**3** When all screen information is complete, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to Save the Agent configuration. Then select Update Configuration on the Configuration menu to activate or schedule the update of these configuration changes.

Follow these steps to delete an Agent from database:

**ID #**

**1**  Type the existing Agent's Identification Number and press **ENTER/CLICK**.

(or)

Press the **F2/DBL CLICK** to display all Agents' Identification Numbers, highlight **Agent ID** and press **ENTER/CLICK** to select.

**2**  All Agent information will display on the screen.  Press the **ALT-D Keys** simultaneously (or highlight Delete and press ENTER/CLICK), confirm YES to delete, and the Agent will be deleted.

# Group Configuration

After all Agents have been configured, you can configure the Groups you will need for your call center. When Groups are configured they will display in the choice lists when you configure Lines, Emergency Group, and Supervisors.

> *Notes: There are instances, however, when you might not assign Agents to a Group. For example: if you just want to use an Automated Attendant (AUTO ATTD) Routing Command for a Group so that the Announcement will direct the caller to a different Group or Extension, you can name a Group the Auto Attd Group to perform this one operation without the intervention of Agents.*
>
> *You can also configure a Group to handle Caller Directed Routing (CDR) calls. Refer to Caller Directed Routing Number Configuration found under Line Configuration to setup CDR information in CDR Tables.*

There is 1 screen and 3 subscreens to complete for Group Configuration:

◗ **Group Configuration screen**

- Routing Table subscreen
- Agent Selection subscreen
- Overflow Group subscreen

**Group Configuration** screen contains 12 fields to complete:

◗ Group Number
◗ Description
◗ Name on Station Set
◗ Transfer DN
◗ Wrap Type
◗ Wrap Duration
◗ Auto Logout / Duration
◗ Prompted Categorization
◗ Priority
◗ TSF Interval
◗ TSF Threshold
◗ Unavailable Duration

**Routing Table** subscreen contains 3 fields to complete:

◗ Routing Hours
◗ Day Routing Command
◗ Night Routing Command

**Agent Selection** subscreen contains 2 fields to complete:

◗ Method of Selection
◗ Agent Selection

**Overflow** subscreen contains 3 fields to complete:

◗ Overflow Group
◗ Call
◗ Time

## Group Configuration

In this section steps are provided so you can perform the following tasks:

◗ Access the Group Configuration screen.

◗ Add a Group:

- Complete Group's Routing Table.
- Select Agents for Group.
- Assign Overflow Group.
- Copy Group information to another Group.

Follow this step to access the Group Configuration screen from the Configuration Menu:

**1** On the **Configuration Menu**, move cursor to highlight **Group** and press **ENTER/CLICK** to select. The next screen to display is the Group Configuration screen.

```
01/02/01  11:22:11 am        CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control   DOS-Shell
           ┌─ Agent ─────────────────┐      ■
           │         ─────── Group Configuration ───────
           │
           │  Group Number                              Save
           │  Description
           │  Name on Station Set                       Delete
           │
           │  Transfer DN                               Copy
           │  Wrap Type                 Duration    :
           │  Auto-Logout          NO  (√)  YES ( ) Duration     :    Exit
           │  Prompt Categorization NO (√)  YES ( )
           │  Priority             0
           │  T.S.F Interval       (min)  Threshold    (secs)
           │  Unavailable Duration 00:00
           │
           │    Routing  ▶    Agent Selection ▶    Overflow Group ▶
           │

 Type in up to 2 numbers, or press F2/DBL CLICK and select Group from list
```

Follow these steps to add a Group:

**Group Number** (required field)

**1** Type in **up to 2 numeric characters** (for CINPHONY II; 1 numeric character for PRELUDE and CINPHONY I). Highlight Description field.

If you want to bring up an existing Group for updating purposes, press F2/DBL CLICK, highlight Group, and press ENTER/CLICK to select. You can then update this screen and subscreens. You can also delete this Group (ALT-D keys) once it has been displayed in the same manner.

*Note: For PRELUDE, you can add up to 3 Groups; for CINPHONY I, you can add up to 6 Groups; and, for CINPHONY II, you can add up to 80 Groups.*

**Description** (required field)

**2** Type in **up to 20 alphanumeric characters**. Highlight Name on Station Set field.

**Name on Station Set** (required field)

**3** Type in **up to 8 alphanumeric characters** that abbreviates the Description of the Group to display on the Station Set. Highlight Transfer DN field.

*System Wide Parameters / Display on Station Set Note:*

*On the System Wide Parameters screen, you can select whether you want the Group, DNIS/DID Description, CDR Number, or CDR Description to display on the Agents' Station Set when ACD Calls reach the Station Sets. There are 4 types of configurations possible to help you make your selection:*

- *Group is default*.  When an ACD call has not been routed by Destination Number Configuration (DNIS) or Caller Directed Routing Number Configuration (CDR), the Group to where the call was routed will display on the Station Set.

- *Select Group or DNIS/DID Description*.  When an ACD call is  routed by Destination Number Configuration (DNIS/DID) to a Group.

- *Select Group, DNIS/DID Description, CDR Number or CDR Description*.  When an ACD call is routed by Destination Number Configuration (DNIS/DID) to the CDR Table.

- *Select Group, CDR Number, or CDR Description*.  When an ACD call is routed by Caller Directed Routing Number Configuration (CDR) to the CDR Table.

**Transfer DN** (optional field)

4   Type in **2 to 7 numeric characters** (range 21-9999999).  Highlight Wrap Type field.

*Note: Transfer Directory Number is a non-physical Norstar DN allowing calls to be transferred to the Group being configured.  For example, a receptionist answers a call that was not received as an ACD Call; however, the call can be transferred to ACD by using the Transfer DN.  The call then becomes an ACD Call and enters the queue for the Group.*

**Wrap Type** (required field)

5   Press  **F2/DBL CLICK** to display the 3 ways to specify the length of wrap time allotted to an Agent after completing an ACD call and being made available for another call:

- AUTOMATIC (if selected, specify duration)

- MANUAL (Agent cancels wrap via the Cancel Wrap feature code)

- NONE (Agent is immediately available after completing ACD call)

Highlight **Type** and press **ENTER/CLICK** to select. Highlight Duration field.

**Duration (Wrap)**

6   If you selected AUTOMATIC as the Wrap Type, you can change the 30 second default time.  Type in the **Duration using the format MM:SS (range 00:05 - 59:59)**.  Highlight Auto-Logout Duration  field.

*Note:  If you are using forced categorization, a minimum 10 second wrap is required.*

**Auto Logout / Duration** (required field)

7   Use **Right** or **Left Arrow keys** to position **checkmark** in **YES** or **NO** field**.**

If you want to **place Agents in an Unavailable state** after the specified duration, select **NO**.  In this case, Agents will be placed in an Unavailable state after the duration has expired.  Type in the **Duration** using the format **MM:SS** (range 00:05-59:59).  This feature, for example, allows a multi-tasked user to attend to a non-telephone related matter without requiring a logout each time.  Changing the taste to unavailable when an Agent cannot answer the set prevents additional calls being sent to the Agent.  When the Agent is ready to accept calls, the Agent needs only to press the Available programmed key.

If you want to **place Agents in a Logged Out state** after the specified duration, select **YES**.  In this case, Agents will be logged out after the duration has expired.  Type in the **Duration** using the format **MM:SS** (range 00:05-59:59).

*Auto Logout Note:  It is recommended that Auto Logout to Unavailable or Logged Out should be configured consistently between Groups, especially if Agents are assigned to multiple Groups.  For example: an Agent is assigned to Groups 1 and 2.  Group 1 is set to Auto Logout -Unavailable (Duration=59 seconds) and Group 2 is set to Auto Logout- Logged Out (Duration=60 seconds).  If the Agent does not answer the phone for 59 seconds, the Agent is placed in an Unavailable state for Group 1; however, one second later the Agent is logged out of all Groups because the Auto Logout Duration has expired for Group 2.*

*Delayed Ring Transfer Note: The Norstar has a Delayed Ring Transfer (DRT) that is set in number of rings.  Each ring occurs approximately every 6 seconds; therefore, the Auto-Logout in ACD should be set less (in seconds) than the number of rings set for the Norstar DRT.  For example, if ACD Auto-logout is set for 30 seconds, the Norstar DRT should be set to at least 6 rings (approximately 36*

*seconds). A DRT shorter than the Auto-Logout Duration results in an Agent being unavailable rather than logged out.*

**Prompt Categorization** (required field, YES/NO)

**8** If you do not want to prompt Agents to enter a Category Code upon completing an ACD call, select NO. If you want to prompt Agents to enter a Category Code upon completing a call, select YES. **Use Right or Left Arrow keys to position checkmark in YES or NO field.** Press **ENTER/CLICK** to move cursor down to Priority field.

*Note: If NO is selected, Agents can still manually enter Code after completing the call. If Category Codes are to be entered, Wrap Type must be set to AUTOMATIC or MANUAL.*

**Priority** (required field, CINPHONY I and II only)

**9** Press **F2/DBL CLICK**, highlight Line Priority (1-10), and press **ENTER/CLICK** to select.

*Notes: The Default Priority is the order you set for the lines this Group will be using. For example, calls received on Lines with higher priority will be distributed to Agents ahead of calls with lower priority regardless of their length of time in queue. The default is 5 for all lines to make it easier for you to increase or decrease prioritization. 1 = highest and 10 = lowest priority.*

*Refer to SET PRIORITY and INCREASE PRIORITY Commands in the Routing Commands section.*

**TSF Interval**

**10** To specify TSF Interval, type in **up to 2 numeric characters** for interval minutes (range 01-99). Highlight TSF Threshold field.

*Note: The Telephone Service Factor is the percentage of calls answered within a Threshold period (in seconds) for the TSF Interval (in minutes). You can specify the TSF Interval and the Threshold. For example, during a 10 minute interval how many calls were answered within a 30 second threshold (from first ring to answer).*

**11** To specify TSF Threshold, type in **up to 3 numeric characters** for threshold seconds (range 001-999).

**Unavailable Duration**

**12** Type in the **Duration using the format MM:SS (range 00:00-59:59)**.

*Note: Unavailable Duration is the time specified for all Agents in a Group to remain Unavailable before this status is alerted. When an Agent has exceeded the specified time period, the Unavailable field for this Agent on the Group Status screen will flash. The flashing terminates when the Agent becomes Available or if the Unavailable Duration value is increased. If you do not want to set a duration, leave the field value at 00:00.*

**13** When completed with all screen and subscreen edits, press **F10 key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to save these configurations. Then select Update Configuration on the Configuration Menu to activate or schedule the update of these configuration changes.

Follow these steps to complete Group's Routing Table:

**1** Highlight **Routing** button and press **ENTER/CLICK** to display Routing Table screen.

```
┌──────────────── Routing for Group 1 CUSTOMER SUPPORT ────────────────┐
│                                                                       │
│      ┌─Routing Hours─┐    ┌────────Day Routing────────┬───Night Routing───┐
│   Day │ Start   End  │ Step│  Command       Value     │ Command      Value │
│                      │     │                          │                    │
│   SUN │ 00:00 - 00:00│  1  │ DELAY ANSWER - 00:10      │ FORCED ANNC. - 8   │
│   MON │ 08:00 - 17:00│  2  │ FORCED ANNC. - 1          │ DISCONNECT   -     │
│   TUE │ 08:00 - 17:00│  3  │ DISTRIBUTE   - 00:20      │              -     │
│   WED │ 08:00 - 17:00│  4  │ ANNOUNCEMENT - 2          │              -     │
│   THU │ 08:00 - 17:00│  5  │ DISTRIBUTE   - 00:15      │              -     │
│   FRI │ 08:00 - 17:00│  6  │ ANNOUNCEMENT - 3          │              -     │
│   SAT │ 00:00 - 00:00│  7  │ GO TO STEP   - 04         │              -     │
│                      │  8  │              -            │              -     │
│                      │  9  │              -            │              -     │
│                      │ 10  │              -            │              -     │
│                      │ 11  │              -            │              -     │
│                      │ 12  │              -            │              -     │
│                      │ 13  │              -            │              -     │
│                      │ 14  │              -            │              -     │
│                      │ 15  │              -            │              -     │
│   OK        Cancel   │ 16  │              -            │              -     │
│                                                                       │
│  ████████████████████████████████████████████████████████████████    │
│  Type in Start Time using the format HH:MM (range 00:00-24:00)        │
└───────────────────────────────────────────────────────────────────────┘
```

**Routing Hours** (start time and end time)

**2** Type in start time **using format HH:MM (range 00:00-24:00)**.  Highlight Routing Hours end time field.  Type in end time **using format HH:MM (range 00:00-24:00)**.  Hours within the range specified constitute Day Hours.  Hours outside the range are Night Hours.  You can specify the Routing Hour Day and then the times for that day.

*Note: If you do not have business hours on a specific day of the week, specify that day's hours only as 00:00-00:00 and Night Routing Hours will be used for the complete 24 hour period.*

Highlight Day Routing Command field Step 1. Use the **Ctrl** key in conjunction with **Left and Right Arrow keys** to move from Routing Hours region to Day and Night Routing Commands regions.

**Day or Night Routing Command**

**3** Press **F2/DBL CLICK**, highlight **Routing Command**, and press **ENTER/CLICK** to select.  The Value field will be highlighted so you can specify a value for this Command.

**Value (for Routing Command)**

**4** Type in value for Routing Command.  See Routing Command and Values listed below.  Select Command and specify Value for all Steps you want to use on this Table.

*Notes:  For PRELUDE, there are 8 Steps in Routing Table; and, for CINPHONY Levels I & II, there are 16 Steps in Routing Table.*

*To insert a blank row and add a Command, highlight Command row and press the ALT-I keys simultaneously.  Then add Routing Command. All Commands below inserted row will move down one row.  As you delete or insert commands, it may be necessary to access and change the values of existing commands (e.g., GO TO STEP).*

*To delete a Command, highlight Command and press the ALT-D keys simultaneously.  All Commands below the deleted Command will move up one row.*

*The first blank Routing Command field following the last configured Routing Command will act as a Distribute Command with an indefinite time period until the call is answered by an Agent.  It is best, therefore, to select a Routing Command for the last step that expedites the answering of each call.*

**Routing Commands and Values:**

**ALERT** - enables you to assign an alert ring to a Station Set by entering its DN for the ALERT Command Value. When a call comes in, is routed to this Group, and reaches the ALERT Command; the alert ring will sound at the DN.  The ALERT Command can be used more than once on the Routing Command Table.

Value: type in up to 7 numeric characters.

CINPHONY I and II only - 12 DNs can be programmed with ALERT.

> *Note: Try to minimize the use of Station Sets that are assigned for alert ring. Agents cannot log in on this Station Set. You cannot enter a Voice Port DN or a Group DN.*

**ANNOUNCEMENT** - plays a recorded announcement. This announcement is interrupted when an Agent becomes available to take a call.

Value: type in 3 numeric characters for Announcement Number. A maximum of 240 Announcements can be recorded.

> *Note: Using Recorded Announcement Configuration, you can add a Description to each Announcement Number to further identify the Announcement.*

**AUTO ATTD** - if you have installed the Automated Attendant Add-On, you can use this Command to play an Announcement to the caller and prompt for a caller response indicating their choice of how to direct their call. The caller presses specified keys on the Station Set keypad to attend to the call.

> *Note: PRELUDE - maximum of 6 AUTO ATTD Menus and 240 Recorded Announcements can be used; CINPHONY I - 12 AUTO ATTD Menus and 240 Recorded Announcements can be used; and CINPHONY II - 80 AUTO ATTD Menus and 240 Recorded Announcements can be used.*

You can direct a call with the following Routing Commands:

> **CDR TABLE** - sends call to the specified CDR Table.
>
> Value: select 1.
>
> *Note: Make sure that the CDR Table has been previously configured. Refer to Caller Directed Routing Number Configuration found under Line Configuration.*
>
> **CONTINUE** - go to next Command in Routing Table.
>
> **GO TO STEP** - go to Step in Routing Table.
>
> **GROUP** - send call to particular Group to follow that Group's Routing Commands.
>
> **REPLAY** - replay AUTO ATTD Announcement. Announcements can be replayed up to 3 times. This step should not be applied to None and No Port for current Group.
>
> **TRANSFER** - send call to a Station Set DN.
>
> Values:
>
> - GO TO STEP, type in Routing Command Step
> - GROUP, type in Group Number
> - TRANSFER TO, type in Station Set DN (Extension).

```
┌─────────────────── Routing for Group 1 GROUP ONE ───────────────────┐
│                                                                     │
│  ┌──────Routing Hours──────┐  ┌──────────Day R┌─ Group 1  AUTO ATTD MENU ─┐│
│  │ Day │ Start     End     │  │Step   Command │  Announcement   5         ││
│  │                         │  │               │                           ││
│  │ SUN │ 00:01 - 23:59     │  │ 1    AUTO ATTD│  Digit     Command     Value││
│  │ MON │ 00:01 - 19:00     │  │ 2    DISTRIBUTE│                          ││
│  │ TUE │ 08:00 - 19:00     │  │ 3    ANNOUNCEME│    0     TRANSFER TO   221 ││
│  │ WED │ 08:00 - 19:00     │  │ 4    DISTRIBUTE│    1     GROUP          4  ││
│  │ THU │ 08:00 - 19:00     │  │ 5    ANNOUNCEME│    2     GROUP          3  ││
│  │ FRI │ 08:00 - 19:00     │  │ 6    DISTRIBUTE│    3     GROUP          2  ││
│  │ SAT │ 08:00 - 23:59     │  │ 7    ANNOUNCEME│    4     REPLAY            ││
│  │                         │  │ 8    GO TO STEP│    5     REPLAY            ││
│  │                         │  │ 9             │    6     REPLAY            ││
│  │                         │  │10             │    7     REPLAY            ││
│  │                         │  │11             │    8     REPLAY            ││
│  │                         │  │12             │    9     REPLAY            ││
│  │                         │  │13             │  None    TRANSFER TO   221 ││
│  │                         │  │14             │  No Port  TRANSFER TO   221 ││
│  │                         │  │15             └───────────────────────────┘│
│  │ OK         Cancel       │  │16        │         -              -        │
│  └─────────────────────────┘  └──────────────────────────────────────────┘│
│                                                                     │
│  ████████████████████████████████████████████████████████████████  │
│  Type in the numeric Value for GO TO STEP, GROUP, or TRANSFER Command│
└─────────────────────────────────────────────────────────────────────┘
```

**AVERAGE QTIME ANNOUNCEMENT** - you can use this command to announce to the caller how long the caller might have to wait before the call is answered (1 through 10 minutes)".  There are two linked announcements making up this command.  The first announcement makes the statement: " The average time to answer a call today is approximately…".  The second announcement provides the calculated time: "one minute" through  "ten minutes or longer".  You can select the Pre-Recorded set of Announcements or select the User-Recorded set of Announcements.  If you select User Recorded Announcements, refer to Chapter 3: Using Norstar Sets, Performing Supervisor Functions, Announcement Maintenance for directions to record these Announcements.

Follow these steps to configure Average QTime Announcement:

- On a Routing Command Step, select AVG QTIME ANNOUNCEMENT.

- Highlight the Value field to display the Avg QT Annc/Exp QT Annc Value screen.

- In the Language field, press the F2 key to display ENGLISH and FRENCH choices.  Highlight the Language for the Announcements you want callers to hear and press ENTER to select.

- In the Announcement set field, press the F2 key to display PRE-RECORDED and USER-RECORDED choices.  Highlight the Announcement set you want to use and press ENTER to select.

For more information on the calculation criteria and rules of use for Average QTime Announcement, refer to Appendix 7: Average & Expected QTime Announcements.

**EXPECTED QTIME ANNOUNCEMENT** - you can use this command to announce to the caller how long a caller might be expected to wait before the call is answered (1 through 10 minutes).  There are two linked announcements making up this command.  The first announcement makes the statement: " The expected wait time for your call is approximately…".  The second announcement provides the calculated time: "one minute" through  "ten minutes or longer". You can select the Pre-Recorded set of Announcements or select the User-Recorded set of Announcements.  If you select User Recorded Announcements, refer to Chapter 3: Using Norstar Sets, Performing Supervisor Functions, Announcement Maintenance for directions to record these Announcements.

Follow these steps to configure Expected QTime Announcement:

- On a Routing Command Step, select EXP QTIME ANNOUNCEMENT.

- Highlight the Value field to display the Avg QT Annc/Exp QT Annc Value screen.

- In the Language field, press the F2 key to display ENGLISH and FRENCH choices.  Highlight the Language for the Announcements you want callers to hear and press ENTER to select.

- In the Announcement set field, press the F2 key to display PRE-RECORDED and USER-RECORDED choices. Highlight the Announcement set you want to use and press ENTER to select.

For more information on the calculation criteria and rules of use for Expected QTime Announcement, refer to Appendix 7: Average & Expected QTime Announcements.

**CDR TABLE** - if you have installed the Caller Directed Routing Add-On, you can use this Command to send the call to a specified CDR Table. When the call reaches the table, a Primary Announcement is played to direct the caller to enter a code (digit string) to direct the call to the appropriate Group configured to handle these calls. Refer to Caller Directed Routing Number Configuration found under Line Configuration.

Value: type in 1, 2, or 3.

> *Note: Make sure that the CDR Table has been previously configured. Refer to Caller Directed Routing Number Configuration found under Line Configuration.*

**DELAY ANSWER** - delays the answering of a call for the time period specified (range - 00:01 to 59:59). When a call arrives on a Line assigned to a Group, ACD will refrain from answering until either the DELAY ANSWER time has passed or an Agent becomes available. When used, this Command must be specified as the first Routing Command. During the Delay Answer duration, the ACD backup set will ring and the caller will hear ringing.

Value: type in time period using format MM:SS (range 00:01-59:59).

> *Notes: If ICLID is set to YES and DELAY ANSWER is used as first routing command step, DELAY ANSWER duration must be greater than the ICLID Delay Time specified in System Wide Parameters.*
>
> *If ORIG is specified as Line Routing and DELAY ANSWER is used as first routing command step, DELAY ANSWER duration must be greater than the ICLID Delay Time specified in System Wide Parameters.*

**DISCONNECT** - ends the call. No entry is required in value field.

**DISTRIBUTE** - looks for first available Agent in the Group to send call within the time specified.

Value: type in the time using format MM:SS (range 00:01-59:59)

> *Note: Until an Agent is available, the caller will hear Norstar's hold source (i.e., tones, music, or silence).*

**FORCED ANNOUNCEMENT** - plays a recorded announcement without interruption, even if Agent is available.

Value: type in up to 3 numeric characters for Announcement number. A maximum of 240 Announcements can be recorded.

**GO TO STEP** - returns caller to previously specified step, executes that step's command, and then repeats following commands.

Value: type in the Step number (PRELUDE 1-8 Steps and CINPHONY I & II 1-16 Steps).

> *Note: You cannot go to the previous Step before GO TO command step, to previous GO TO command step, or any Step following GO TO command Step.*

**GROUP** - sends the call to a different Group to become an ACD call in that Group's queue.

Value: type in up to 2 numeric characters.

**INCREASE PRIORITY** - increases the PRIORITY of a call incrementally so that it gets distributed and answered by first available Agent.

Value: type in 1 numeric character (1-10).

> *Note: If a LINE DEFAULT PRIORITY is 5, for example, and you set INCREASE PRIORITY to 1, the new priority becomes 4 and increases by the same incremental value if the call is not answered by the time it cycles through the commands and back to INCREASE PRIORITY.*

**LINE XFER** - transfers a call to a Line or Line Pool and dials out to the telephone number specified. An appropriate Command should follow this Command in the event the transfer fails because the line specified is busy (e.g, a brief DISTRIBUTE and then a GO TO STEP will try the transfer again). Make sure that the

Line from which the call is transferred has Norstar Disconnect Supervision function.  A maximum of 80 Line Transfers are allowed.

Value: type in L followed by Line Number (1-9) and a comma, and then type in external number (e.g., L1,8612000).  Or type in P followed by Pool Line Number (1-9 or A-O) and a comma, and then type in external number (e.g., PA,8612000). Or type in PRI (Primary Rate Interface) followed by a comma, the 2 digit Norstar Destination Code, and then type in external number (e.g., PRI,778612000).  Do not use the # symbol in a LINE XFER string.

> *Note:  If you are using a NI2 format for PRI, make sure the Norstar is configured with Prime Set= the Backup Set.*

**LINK XFER** - transfer a call outside the Norstar using a flashhook and dialing a specified telephone number.  Can be used with Norstar DR3 or greater.  An appropriate Command should follow this Command in the event of a transfer failure.  A maximum of 80 Link Transfers are allowed.

Value: type in up to 30 characters for string (all digits, #, *, and a comma - for pause).

**NO ANSWER** - the call continues to ring until caller hangs up.  Used as Step 1 only; no entry is required in Value field.

> *Note: If call has been transferred to ACD Group and receives a NO ANSWER, the call will return to originating Norstar step (i.e., receptionist or StarTalk).*

**SET PRIORITY** - re-prioritizes the call so that it gets distributed and moved closer to the beginning of the queue regardless of length of time in queue, unless the Default Priority is set to 1.  A GO TO or DISTRIBUTE command should follow this command.

Value: type in up to 2 numeric characters (1-10).

> *Note: When SET PRIORITY is used, it changes the Default Priority of the call to its value although the call originated or was transferred from a Group with a different priority.*

**TRANSFER TO** - transfers call to a Norstar DN.  An appropriate Command should follow this Command in the event of a transfer failure (e.g., a brief DISTRIBUTE and GO TO STEP to return to the TRANSFER TO and retry).

Value: type in 2 to 7 numeric characters.

> *Note: An ACD Call transferred to an extension (DN) is no longer considered an ACD Call.*

**VMAIL XFER** - transfers a call to an initialized and registered mailbox or Custom Call Routing (CCR) Tree number in a Norstar voice mail application (e.g., StarTalk).  An appropriate Command should follow this Command in the event of a transfer failure (e.g., a brief DISTRIBUTE and GO TO STEP to return to the VMAIL XFER and retry). A maximum of 80 Voice Mail Transfers are allowed

Value: For Mailbox: type in up to 7 alphanumeric characters.  For CCR Tree, type in 1 numeric character (1, 2, 3, or 4) and a # symbol for the CCR Tree number.  Refer to your Norstar Voicemail System Coordinator for more information on the CCR Tree.

**5** When completed with Routing Table, press **F10 key** (or highlight OK and press ENTER/CLICK, or press Alt-O) to confirm this subscreen configuration.  You will be returned to the Group Configuration screen.

Follow these steps to **select Agents for this Group**:

**1** Highlight the **Agent Selection** button and press **ENTER/CLICK** to display the Agent Selection screen (or press ALT-A).

```
01/02/99  11:24:20 am          CINPHONY (123456)          7% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell

          ┌─ Agent ─────────────────■────────────────────────────┐
          │              ── Group Configuration ──                │
          │                                             ┌ Save    │
          │  Group Number          1                    │         │
          │  Description           CUSTOMER SUPPORT      │         │
          │            ── Agent Selection ──             ┤elete    │
          │                                       ┌ OK   │         │
          │  Method of Selection   LONGEST IDLE   │      │ y       │
          │                                       │Cancel│ t       │
          │    101   J.       HIGGINS      ↑      │      │         │
          │    102   G.       CONNOR       │      │      │         │
          │    103   M.       JONES        │      │      │         │
          │    104   Q.       ADAMS        │      │      │         │
          │    105   E.       MONROE       │      │      │         │
          │    106   R.       SANDSTROM    │      │      │         │
          │    107   P.       GAMBLE       │      │      │         │
          │    108   R.       FANELSEK     ↓      │      │         │
          │                                                       │
    Cursor keys scroll, <ENTER> selects and <ESC> exits choice menu
```

**Method of Selection**

**2**  Press **F2/DBL CLICK**, highlight **Method**, and press **ENTER/CLICK** to select.  Highlight Agent Selection field.

**LONGEST IDLE** - this standard method can be used if you want the call to go to the Agent who has been available the longest since the last call.

**ROUND ROBIN** - this advanced method can be used if you want the call to go to the next available Agent starting with the last Agent logged in.

**TOP DOWN** - this advanced method can be used if you want the call to go to the first available Agent closest to top of list (as listed in the order specified on the Agent Selection list).

**Agent Selection**

**3**  Press **F2/DBL CLICK**, highlight **Agent** to assign to this Group, and press **ENTER/CLICK** to select.

*Notes: To insert an Agent to change order, highlight existing Agent on list and then select new Agent. This Agent will be inserted above the highlighted Agent.*

*If you are using the Round Robin or Top Down selection method, select the Agents in the order of the selection method.*

*To delete an Agent from list, highlight the Agent and then press the ALT-D keys simultaneously.*

*PRELUDE - 60 Agents can be configured, 15 can be logged in at one time; CINPHONY I - 120 Agents can be configured, 30 can be logged in at one time; and CINPHONY II - 240 Agents can be configured, 80 can be logged in at one time.*

**4**  When completed, press **F10 key** (or highlight OK and press ENTER/CLICK, or press ALT-O) to confirm this subscreen configuration.

Follow these steps to assign an Overflow Group to this Group:

**1**  Highlight **Overflow Group** button and press **ENTER/CLICK** to display the Overflow Group Configuration screen.

```
01/02/99  11:22:18 am        CINPHONY (123456)           7% Disk Full

    Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell
  ┌─────────────┐
  │     Agent   │            ■
  └─────────────┴─── Group Configuration ───┐
  │                                          │      ┌──────────┐
  │  Group Number                            │      │   Save   │
  │  Description                             │      │          │
  │  Name on Station Set   ┌───────────────┐ │      │  Delete  │
  │                        │ 1  CUSTOMER SUPPORT ↑ │ │
  │  Transfer DN           │ 2  IN HOUSE SALES   │ │ │   Copy   │
  │  Wrap Type             │                     │ │ │          │
  │  Auto-Logout           │                     │ │ │   Exit   │
  │  Prompt Categorization │                     │ │ │          │
  │  Priority              │                     ↓ │ │
  │  T.S.F Interval        └──(min)─── Threshold ──(secs)┘
  │  Unavailable Duration                    │
  │                                          │
  │   Routing  ▶      Agent Selection ▶   Overflow Group ▶
  └──────────────────────────────────────────┘

  Cursor keys scroll, <ENTER> selects and <ESC> exits choice menu
```

**Overflow Group**

**1** Press **F2/DBL CLICK**, highlight **Group** to become Overflow Group for this Group, and press **ENTER/CLICK** to select. Highlight Call field.

*Notes: For PRELUDE, you can select 1 Overflow Group; for CINPHONY I, you can select up to 3 Overflow Groups; and, for CINPHONY II, you can select up to 8 Overflow Groups.*

*If a Group has more calls in queue than what has been specified, or if any one call has been waiting in queue longer than specified; Overflow makes the calls available to the Agents in the Overflow Group(s).*

*When an overflow call comes to an Agent, it maintains its wrap and force categorization characteristics of the original Group.*

**Call**

**2** Type in **up to 2 numeric characters** (maximum 80) for number of calls to remain in queue before Overflow occurs. Highlight Time field.

*Note: You can specify Calls and/or Time. If either threshold is met, overflow will occur.*

**Time**

**3** Type in length of time a call can remain in queue before overflow occurs **using the format MM:SS (range 00:00-59:59).**

**4** When completed, press **F10 key** (or highlight OK and press ENTER/CLICK, or press ALT-O) to confirm this subscreen configuration. You will be returned to the Group Configuration screen.

When completed with all screen and subscreen edits, press **F10 key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to save all configurations. Then select Update Configuration on the Configuration menu to activate or schedule the update of these configuration changes.

Follow these steps to copy Group information from one Group (source) to this Group (target):

**1** Display target Group. This could be a new Group with no fields completed or an existing Group with all fields completed.

**2** Highlight the **Copy** button (or press ALT-C keys simultaneously). A pop-up screen will display: **Copy From Group ___**.

**3** Type in **source Group Number**, or press **F2/DBL CLICK**, highlight **Source Group**, and press **ENTER/CLICK** to select. The information from the source Group will copy over the target Group. The

only fields not to copy are the Description, Name on Station Set, and Transfer DN that you will need to manually complete.

**4** When completed with target Group, press **F10 key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to save this copy. Then select Update Configuration on the Configuration Menu, to activate or schedule the update of these configuration changes.

*Notes: If the AUTO ATTD Command is being used by the source Group, Routing Data is not copied to target Group. If there is Group, Agent, and/or Overflow data already present in the target Group, this information will be overwritten by the source Group during copy.*

*You can also delete an entire Group (including subscreen information). Highlight the Delete button and press ENTER/CLICK, or press the ALT D keys simultaneously.*

# Line Configuration

When Agents and Groups have been configured, you can configure each Line to route calls to a specific Group. You can also route calls from a particular Line to a Group handling Destination Number Calls and/or a Group handling Originating Number Calls.

There are 5 Line Configuration choices on this menu:

◗ Route Order Configuration

◗ Line Configuration

◗ Destination Number (DNIS/DID)

◗ Originating Number (ANI/ICLID)

◗ Caller Directed Routing Number (CDR)

## Route Order Configuration

You can specify the order that ANI, DNIS, and CDR matching tables are looked at to route a call to the appropriate Group. For example, you can route calls via ANI on PRI Lines. Moreover, for ANI, DNIS, or CDR, you do not have to configure lines. This is most useful when using PRI as all lines are in one pool. You can also, for example, route calls through a DNIS Table and then route the call through ANI Tables within a PRI environment.

*Example of use: ABC Company wants to organize its Agents into Groups based on regions in the country and route calls to these Groups based on Area Codes using ANI/ICLID Routing. This company also uses a PRI connection that handles both ACD and Non-ACD Calls; therefore, destination numbers are published to the company's customer base. Route Order Configuration is then used to route these calls by the DEST/ORIG option. When the calls are sent to Destination Number Table, ANI/ICLID is configured as the Routing choice. The calls are then sent to the Origination Number Table, and, when matching ANI/ICLID numbers are found (based on Area Code), the calls are sent to the specified Groups.*

Route Order Configuration allows you to route ACD Calls to the following:

◗ **Line** – Route Order Configuration is not in effect and calls will be routed by the Routing specified in Line Configuration.

◗ **Origination Number** – ACD Calls are sent directly to an Origination Number Table. If a call matches the configured ANI/ICLID digits, the call is then routed to the specified Group or a CDR Table.

*If an ANI/ICLID match is not found for a call, the call is sent to the Line Configuration table where one of the following will occur:*

• *If a Line has not been configured for this arriving call, the call will ring on the configured Backup Station Set.*

• *If the call has arrived on a Line that has been configured and Delay has been set to Yes for this Line, the call will be routed by what has been specified in the Routing field. If Routing is set to None, the call will be routed to the specified or default Group or CDR Table.*

• *If the call has arrived on a Line that has been configured and Delay has been set to No for this Line, the call will be routed to the specified or default Group or CDR Table.*

◗ **Destination Number** – ACD Calls are sent directly to a Destination Number Table. If a call matches the configured DNIS/DID digits, the call is then routed to the specified Group or a CDR Table.

*If a DNIS/DID match is not found for a call, the call is sent to the Line Configuration table where one of the following will occur:*

• *If a Line has not been configured for this arriving call, the call will ring on the configured Backup Station Set.*

• *If the call has arrived on a Line that has been configured and Delay has been set to Yes for this Line, the call will be routed by what has been specified in the Routing field. If Routing is set to None, the call will be routed to the specified or default Group or CDR Table.*

- • *If the call has arrived on a Line that has been configured and Delay has been set to No for this Line, the call will be routed to the specified or default Group or CDR Table.*

◗ **ORIG/DEST** – ACD Calls with both ANI/ICLID and DNIS/DID digits are sent first to an Origination Number Table. If a call matches the configured ANI/ICLID digits, the call is then routed to the specified or default Group or CDR Table. If a match is not found, the call is then sent to the Destination Number Table. If a call matches the configured DNIS/DID digits, the call is then routed to the specified Group or a CDR Table.

*If both ANI/ICLID and DNIS/DID matches are  not found for a call, the call is sent to the Line Configuration table where one of  the following will occur:*

- • *If a Line has not been configured for this arriving call, the call will ring on the configured Backup Station Set.*

- • *If  the call has arrived on a Line that has been configured and Delay has been set to Yes for this Line, the call will be routed by what has been specified in the Routing  field.  If Routing is set to None, the call will be routed to the specified or default Group or CDR Table.*

- • *If the call has arrived on a Line that has been configured and Delay has been set to No for this Line, the call will be routed to the specified or default Group or CDR Table.*

◗ **DEST/ORIG** – ACD Calls with both DNIS/DID and ANI/ICLID digits are sent first to a Destination Number Table. If a call matches the configured DNIS/DID digits, the call is then routed to the specified or default Group or CDR Table. If a match is not found, the call is then sent to the Origination Number Table. If a call matches the configured ANI/ICLID digits, the call is then routed to the specified Group or a CDR Table.

*If both DNIS/DID and ANI/ICLID matches are not found for a call, the call is sent to the Line Configuration table where one of  the following will occur:*

- • *If a Line has not been configured for this arriving call, the call will ring on the configured Backup Station Set.*

- • *If  the call has arrived on a Line that has been configured and Delay has been set to Yes for this Line, the call will be routed by what has been specified in the Routing  field.  If Routing is set to None, the call will be routed to the specified or default Group or CDR Table.*

- • *If the call has arrived on a Line that has been configured and Delay has been set to No for this Line, the call will be routed to the specified or default Group or CDR Table.*

Follow these steps to access the Route Order Configuration screen and specify a Route Order:

**1** On the **Configuration Menu**, highlight **Route Order Configuration** and press **ENTER/CLICK**. The Line Menu will display.

```
01/02/00  11:25:26 am          CINPHONY (123456)           7% Disk Full

    Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                        Agent
                        Group
                        Line
                         ┌──────────────────────────────────┐
                         │  Route Order Configuration        │
                         │  Line Configuration               │
                       ──┤  Destination Number (DNIS/DID)    │
                         │  Originating Number (ANI/ICLID)   │
                         │  Caller Directed Routing (CDR)    │
                         │                                   │
                        Ca│                                  │
                         └──────────────────────────────────┘
                        System Wide Parameters
                        Update Configuration

                        Menu Password
                        Printer
                        Wallboard
                        Infocus Status Display



Press ENTER/CLICK to display Line Configuration screen
```

Highlight **Route Order Configuration** on this menu and press **ENTER/CLICK** to display the Route Order Configuration screen.

```
11/23/00  11:25:26 am          CINPHONY (123456)           7% Disk Full

    Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                        Agent
                        Group
                        Line
                         ┌─Route Order Configuration─┐
                      ┌──┤                           │
                      │Line Co│ Route Order    DEST NUM │
                      │Route O│                         │
                      ├───────│                         │
                      │Destina│     Save       Exit     │
                      │Origina│                         │
                      │Caller └───────────────────────┘
                      └───────┘
                        Call Categorization

                        System Wide Parameters
                        Update Configuration

                        Menu Password
                        Printer
                        Wallboard
                        Infocus Status Display



Press F2/DBL CLICK and select Route Order type from list
```

2  Press **F2/DBL CLICK** and select either **Line**, **ORIG NUM**, **DEST NUM**, **ORIG/DEST**, or **DEST/ORIG**.

3  When all screen information is completed, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to save this configuration.

Then select Update Configuration on the Configuration Menu to activate or schedule the update of these configuration changes.

## Line Configuration

There is 1 screen with 6 fields to complete when configuring a Line:

◗ Line

◗ Line Description

◗ Routing

◗ Group

◗ Priority

◗ Delay

In this section steps are provided so you can perform the following tasks:

◗ Access the Line Configuration screen.

◗ Add a Line and Description, select Routing, select Group or CDR Table, prioritize the Line, and specify if the Line should delay (Yes or No).

*Notes: When you assign a Group to a Line, it becomes an ACD Line. When you prioritize a Line, you give a priority number to the line that becomes the order in which the call is handled.*

*If a Line is an ACD Line, a Group or CDR Table must be assigned.*

Follow this step to access the Line Configuration screen from the Configuration Menu:

**1** On the **Configuration Menu**, highlight **Line** and press **ENTER/CLICK**. The Line Menu will display.

```
01/02/00  11:25:26 am          CINPHONY (123456)          7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                  Agent
                  Group
                  Line

                     Route Order Configuration
                     Line Configuration
                     Destination Number (DNIS/DID)
                     Originating Number (ANI/ICLID)
                     Caller Directed Routing (CDR)

                  Ca

                  System Wide Parameters
                  Update Configuration

                  Menu Password
                  Printer
                  Wallboard
                  Infocus Status Display


Press ENTER/CLICK to display Line Configuration screen
```

Highlight **Line Configuration** on this menu and press **ENTER/CLICK** to display the Line Configuration screen.

# Chapter 2: Configuration

```
01/02/01  11:26:01 am        CINPHONY (123456)          7% Disk Full

  Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell
                           ┌─ Line Configuration ─┐

 ┌────┬──────────────────┬───────────┬─────────────────────┬──────┬─────┐
 │Line│   Description    │  Routing  │    Group/CDR Table  │Prior.│Delay│
 ├────┼──────────────────┼───────────┼─────────────────────┼──────┼─────┤
 │ 1  │ LINE 1           │ NONE      │ 1 CUSTOMER SUPPORT  │  5   │ NO  │
 │ 2  │ LINE 2           │ NONE      │ 1 CUSTOMER SUPPORT  │  7   │ NO  │
 │ 3  │ LINE 3           │ ORIG NUM  │ 2 IN HOUSE SALES    │  3   │ YES │
 │ 4  │ LINE 4           │ ORIG/DEST │ 2 IN HOUSE SALES    │  4   │ YES │
 │119 │ LINE 119         │ DEST NUM  │ 2 IN HOUSE SALES    │  6   │ YES │
 │120 │ LINE 120         │ DEST/ORIG │ 2 IN HOUSE SALES    │  7   │ YES │
 │ 5  │ LINE 5           │ CDR TABLE │ 4 MANUFACTURING     │  7   │ YES │
 └────┴──────────────────┴───────────┴─────────────────────┴──────┴─────┘

      Save        Exit

 Type in up to 3 numeric characters for a Line and press ENTER (Alt D Del Row)
```

Follow these steps to add a Line, select Routing, select Group, prioritize a Line, and specify if a Line should delay:

**Line** (required field)

**1** Type in **up to 3 numeric characters** for a Line. A default Description will display - Line n.

*Notes: If you are using a Norstar KSU DR5 version or less, you can specify a Line Number range of 1-80. For a DR6 or greater, you can specify a Line Number range of 1-120. For a MICS 2.0 version, you can specify a Line Number range of 1-144. For a MICS version less than 2.0, you can specify a Line Number range of 1-120. For a CICS, you can specify a Line Number range of 1-48.*

*PRELUDE - you can utilize up to 30 Lines; CINPHONY I - you can utilize up to 80 Lines; and CINPHONY II - you can utilize up to 120 Lines (with MICS 4.0, 144 lines).*

**Line Description** (optional field, default name)

**2** To change default Description, type in **up to 20 alphanumeric characters**. Highlight Routing field.

**Routing**

**3** Press **F2/DBL CLICK**, highlight **type of Routing** for calls coming in on this Line, and press **ENTER/CLICK** to select.

**NONE** - all calls coming in on this Line will go to Group specified.

**ORIG NUMBER** - a call arriving on this line with ANI or ICLID will be sent to the Group configured through Originating Number Configuration (ANI/ICLID).

*Note: If ORIG is specified as Line Routing and DELAY ANSWER is used as first routing command step, DELAY ANSWER duration must be greater than the PRI/ICLID Delay Time specified in System Wide Parameters.*

**DEST NUMBER** - a call arriving on this line with DNIS or DID will be sent to the Group configured through Destination Number Configuration (DNIS/DID).

**ORIG/DEST** - a call arriving on this line with both Originating Number and Destination Number will be sent to the Group configured through Originating Number Configuration (ANI/ICLID). If Originating Number is not sent, Destination Number Routing is followed.

**DEST/ORIG** - a call arriving on this line with both Destination Number and Originating Number will be sent to the Group configured through Destination Number Configuration (DNIS/DID). If Destination Number is not sent, Originating Number Routing is followed.

**CDR TABLE** - a call arriving on this line will be sent to the CDR Table (Caller Directed Routing).

*Notes: Make sure that the CDR Table has been previously configured.  Refer to Caller Directed Routing Number Configuration found under Line Configuration.*

*If you are specifying Originating Number or Destination Number or both, make sure Originating (ANI/ICLID) and/or Destination (DNIS/DID) numbers have been configured.  Refer to Originating Number Configuration (ANI/ICLID) and/or Destination Number Configuration (DNIS/DID) screens.*

*If ORIG, DEST, ORIG/DEST, or DEST/ORIG is specified and nothing has been configured in Originating or Destination Configuration to match the number sent on the line, the call will be sent to the default Group specified in Line Configuration.*

*If ORIG, DEST, ORIG/DEST, or DEST/ORIG is specified and Delay has been set to NO for the Line, the call will be sent to the default Group specified in Line Configuration.*

**Group/CDR Table** (required field)

**4** Press **F2/DBL CLICK**, highlight **Group** or **CDR Table**, and press **ENTER/CLICK** to select.  A Group or CDR Table can be assigned to more than one Line.  Calls coming in on this Line will be sent to this Group or CDR Table unless a different Routing scheme is in use.  Highlight Priority field.

**Priority** (required field)

**5** Press **F2/DBL CLICK**, highlight  **Priority** (range 1-10), and press **ENTER/CLICK** to select.

*Notes:  The priority in this field reflects to the priority configured for the Group or CDR Table.  If changed, the priority selected here is for all calls received on this Line.*

*If you specify a Priority 1 for a Line, then the calls for that Line will be handled first regardless of length of time in queue.  Each call on the Line will be routed by ACD to the appropriate Group and Agent or CDR Table.*

*1 = highest and 10 = lowest priority.*

*Refer to SET PRIORITY and INCREASE PRIORITY Routing Commands.*

**Delay** (required field)

**6** Press **F2/DBL CLICK**  to display the YES/NO fields.  Highlight **YES** or **NO** and press **ENTER/CLICK** to select.  No is the default for Delay.  Set Delay to YES to allow DNIS/DID or ANI/ICLID to be considered when the Trunk is evaluated.

*Notes:  Refer to System Wide Parameters screen, Configuration menu, to specify the length of time for the delay period  (1-10 seconds).*

*If you selected YES, there will be a default 5 second delay when a call arrives on a Line.  ACD will not answer the call until the 5 seconds pass or ANI/ICLID or DNIS/DID information is received by the Norstar.*

*If  Delay is set to YES and DELAY ANSWER is used as first routing command step, DELAY ANSWER duration must be greater than the ICLID Delay Time specified in System Wide Parameters.  If set to NO, the DELAY ANSWER Routing Command will not be applied.*

**7** When all screen information is completed, press the **F10 Key**  (or highlight Save and press ENTER/CLICK, or press ALT-S) to save this configuration.

Then select Update Configuration on the Configuration Menu to activate or schedule the update of these configuration changes.

*Note: You can update an existing Line by editing the row and then saving the changes.  You can also delete a Line row by highlighting the Line field and pressing the ALT-D keys simultaneously.  To add a Line, move cursor to the bottom of the existing list and add new Line.  When the new Line is saved, Lines are re-ordered.*

## Destination Number Configuration (DNIS/DID)

**DNIS (Dialed Number Identification Service)** relates to you the number the caller dialed (the internal destination number, usually on 800 and 900 numbers). **DID (Direct Inward Dial)** is an internal destination number into which a caller can directly dial. If this number has been configured in this table, the call will be sent to the specified Group. You can configure up to 1000 DNIS Numbers for CINPHONY Levels I and II and 3 DNIS Numbers for PRELUDE.

> *Note: The Norstar defines an exact format to recognize "true" DNIS information. Many Central Offices / Carriers cannot support this format. If this is the case with your CO or Carrier, refer to the following topic in this section, **DID Routing from CO switches that cannot send DNIS**. The directions provided there will ensure that you will be able to utilize the DNIS feature via this form of DID routing of ACD Calls.*

There is 1 screen with 5 fields to complete when configuring DNIS and DID Numbers:

◗ DNIS/DID Number

◗ Description

◗ Routing

◗ Group/CDR Table

◗ Priority

In this section steps are provided so you can perform the following tasks:

◗ Access the Destination Number Configuration (DNIS/DID) screen.

◗ Add a DNIS/DID Number and Description, select Routing (Group or CDR Table), select Group or CDR Table, and prioritize the Line.

Follow this step to access the Destination Number Configuration (DNIS/DID) screen from the Configuration Menu:

**1** On the **Configuration Menu**, highlight **Line** and press **ENTER/CLICK**. The Line Menu will display.

```
01/02/00  11:25:26 am        CINPHONY (123456)           7% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell

              Agent
              Group
              Line

                 Route Order Configuration
                 Line Configuration
                 Destination Number (DNIS/DID)
                 Originating Number (ANI/ICLID)
                 Caller Directed Routing (CDR)

              Ca

              System Wide Parameters
              Update Configuration

              Menu Password
              Printer
              Wallboard
              Infocus Status Display


 Press ENTER/CLICK to display Line Configuration screen
```

Highlight **Destination Number (DNIS/DID)** on this menu and press **ENTER/CLICK** to display the Destination Number Configuration (DNIS/DID) screen.

```
01/02/99  11:26:48 am          CINPHONY (123456)          7% Disk Full

 S┌──────────── Destination Number Configuration (DNIS/DID) ───────┐
  │ ┌─────────────┬────────┬──────────┬────────────────────┬──────────┐
  │ │DNIS/DID Number│  Desc  │ Routing │  Group/CDR Table   │ Priority │
  │ ├─────────────┼────────┼──────────┼────────────────────┼──────────┤
  │ │    3680     │ENGLISH │  GROUP   │1 CUSTOMER SUPPORT  │    5     │
  │ │    3681     │FRENCH  │  GROUP   │1 CUSTOMER SUPPORT  │    7     │
  │ │    369*     │MANUFAC │CDR TABLE │5 MANUFACTURING     │    7     │
  │ │             │        │          │                    │          │
  │ │             │        │          │                    │          │
  │ │             │        │          │                    │          │
  │ │             │        │          │                    │          │
  │ │             │        │          │                    │          │
  │ └─────────────┴────────┴──────────┴────────────────────┴──────────┘
  │      Save     Exit
  └──────────────────────────────────────────────────────────────────┘

Press ENTER/CLICK to display the DNIS Configuration screen
```

Follow these steps to add a DNIS/DID Number and Description, select Routing, select Group or CDR Table, and prioritize the Line.

**DNIS/DID Number** (required field)

**1** Type in **up to 10 alphanumeric characters**. Highlight the Description field.

A DNIS or DID Number is obtained from your Service Provider.  The DNIS or DID Number is a string of digits. These digits are what ACD designates as a Destination

Number (DNIS/DID) Call and will route the Line specified via Destination Number to the specified Group or CDR Table.  You can use the **\*** (asterisk) Wildcard to substitute numbers (same as DOS wildcard use).

Example:   All numbers for a call center

    841-3680 - last 4 digits = DNIS Number

    841-3681 - last 4 digits = DNIS Number

    841-3682

    841-3683

    841-3690 - last 4 digits = DNIS Number

    841-3691 - last 4 digits = DNIS Number

    841-3692 - last 4 digits = DNIS Number

    841-3693 - last 4 digits = DNIS Number

    841-3694 - last 4 digits = DNIS Number

The Service Provider has specified that 841-3680, 841-3681, and all 841-369x numbers are DNIS Numbers, you would only need to make 3 entries for the 6 numbers:

**3680**

**3681**

**369\***

Wildcard Rules:

- can be used at end of string
- represents any digits 0-9 that are received after the first specified digits.

**Description**

**2** Type in **up to 8 numeric characters** to further identify the DNIS/DID Number.

*Notes: When you type in a Description for a DNIS/DID Number, this Description will display on a Agent's Station Set when a DNIS Call, routed via Destination Number Configuration, is received.*

*If the Description field is left blank, the digits in the DNIS/DID Number field will display instead on an Agent's Station Set.*

*When the Description or DNIS/DID Number displays on the Station Set, it replaces the Group Name and Time in Queue prompt that normally displays when an ACD Call is received.*

**Routing**

**3** Press **F2/DBL CLICK** and select either **Group** or **Origination Table**.

*Note: Make sure that the Origination Table has been previously configured.*

**Group/CDR Table**

**4** Press **F2/DBL CLICK** and select **Group Number** or **CDR Table** from list. When a call arrives with this DNIS/DID Number, it will be routed to this Group or CDR Table.

**Priority**

**5** Press **F2/DBL CLICK**, highlight a **priority value (1-10)**, and press **ENTER/CLICK** to select. This will prioritize the configured DNIS/DID digits so that calls arriving can be handled at the rate you specify.

**6** When all screen information is completed, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to save this configuration.

Then select Update Configuration on the Configuration Menu to activate or schedule the update of these configuration changes.

*Note: You can update an existing DNIS/DID Number by editing the row and then saving the changes. You can also delete a DNIS/DID row by highlighting the DNIS/DID Number field and pressing the ALT-D keys simultaneously.*

*System Wide Parameters / Display on Station Set Note:*

*On the System Wide Parameters screen, you can select whether you want the Group, DNIS/DID Description, CDR Number, or CDR Description to display on the Agents' Station Set when ACD Calls reach the Station Sets. There are 4 types of configurations possible to help you make your selection:*

- *Group is default. When an ACD call has not been routed by Destination Number Configuration (DNIS/DID) or Caller Directed Routing Number Configuration (CDR), the Group to where the call was routed will display on the Station Set.*

- *Select Group or DNIS/DID Description. When an ACD call is routed by Destination Number Configuration (DNIS/DID) to a Group.*

- *Select Group, DNIS/DID Description, CDR Number or CDR Description. When an ACD call is routed by Destination Number Configuration (DNIS/DID) to the CDR Table.*

- *Select Group, CDR Number, or CDR Description. When an ACD call is routed by Caller Directed Routing Number Configuration (CDR) to the CDR Table.*

## *DID Routing from CO Switches that cannot send DNIS*

Follow these steps to route DID calls from the CO:

*Note: The Norstar Installer Password is required to setup this configuration.*

- Configure T1 Circuits as Trunk Type:E&M
- Set DNIS Number:N off in Norstar Programming.
- Set Received number length to match the number of digits being sent by the CO.
- Configure a Target Line to match the expected received number.
- Assign the Target Lines to the Backup Set.

- Assign a Prime Set to the Target Lines, preferably the Backup Set programmed with as many Intercom keys as possible. Test calls should ring into this set.
- Once test calls are successful, assign the digits to the ACD in Configuration | Line | Destination Number | DNIS/DID Number. Do not do this until test calls successfully ring at the Backup Set.
- Do not configure any Lines in your Line list as the system will monitor all Lines in the Norstar.

## *Configuring PRI Channels in ACD:*

PRI configuration within ACD depends on your environment. Review the following information for the SL1 and NI2 environments and follow the directions if applicable to your system.

**SL1 Environment**

- If the PRI channels are coming from a SL1 environment, the received digits are assigned to target lines in the Norstar, Prime Set is assigned to the ACD backup Station Set, and the same received digits are entered on the Destination Number Configuration screen.
- Set Received number length to match the number of digits being sent by the CO.
- Configure a Target Line to match the expected received number.
- Assign the Target Lines to the Backup Set.

  *Note: Perform this step if you are using MICS 4.0 or less. Do not perform this step if using MICS 5.0.*

- Assign a Prime Set to the Target Lines, preferably the Backup Set programmed with as many Intercom keys as possible. Test calls should ring into this set.
- Once test calls are successful, assign the digits to the ACD in Configuration | Line | Destination Number | DNIS/DID Number. Do not do this until test calls successfully ring at the Backup Set.
- Do not configure any Lines in your Line list as the system will monitor all Lines in the Norstar.

**NI2, 4ESS, and 5ESS Environments**

- If the PRI channels are coming from a NI2 environment, the received digits are not assigned to target lines in the Norstar; but in Trunk/Line Data, the Prime Set is assigned to the ACD Backup Station Set, and the same received digits are entered on the Destination Number Configuration screen. In Norstar Programming, DRT is set to "YES". Do not assign the PRI channels to the ACD in Line Configuration.

## Originating Number Configuration (ANI/ICLID)

You can perform call routing for ANI and ICLID Numbers. ANI/ICLID is a service provided by your local Service Provider.

**ANI (Automatic Number Identification)** is when a call arrives and the originating number displays to inform you of who is calling. You can configure up to 1000 ANI Numbers for CINPHONY I and II and up to 3 for PRELUDE.

**ICLID (Incoming Calling Line Identification)** is similar to ANI, however the Name of the caller can also accompany the number and display on the Station Set. If this number has been configured in this table, the call will be sent to the specified ANI/ICLID Group.

There is 1 screen with 5 fields to complete when configuring ANI and ICLID Numbers:

◗ ANI/ICLID Number

◗ Description

◗ Routing

◗ Group/CDR Table

◗ Priority

In this section steps are provided so you can perform the following tasks:

◗ Access the Originating Number Configuration (ANI/ICLID) screen.

◗ Add an ANI/ICLID Number and Description, select Routing (Group or CDR Table), select Group or CDR Table, and prioritize the Line.

Follow this step to access the Originating Number Configuration (ANI/ICLID) screen from the Configuration Menu:

**1** On the **Configuration Menu**, highlight **Line** and press **ENTER/CLICK**. The Line Menu will display.

```
01/02/00  11:25:26 am          CINPHONY (123456)           7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control   DOS-Shell

                    Agent
                    Group
                    Line

                         Route Order Configuration
                         Line Configuration
                         Destination Number (DNIS/DID)
                         Originating Number (ANI/ICLID)
                         Caller Directed Routing (CDR)

                    Ca

                    System Wide Parameters
                    Update Configuration

                    Menu Password
                    Printer
                    Wallboard
                    Infocus Status Display


   Press ENTER/CLICK to display Line Configuration screen
```

Highlight **Originating Number (ANI/ICLID)** on this menu and press **ENTER/CLICK** to display the Originating Number Configuration (ANI/ICLID) screen.

```
01/08/99   1:25:49 pm              CINPHONY (112233)              19% Disk Full
┌─────────────────── Originating Number Configuration (ANI/ICLID) ───────────────┐
│  ┌──────────────────┬──────────┬─────────┬──────────────────────┬──────────┐  │
│  │ ANI/ICLID Number │  Desc.   │ Routing │   Group/CDR Table    │ Priority │  │
│  ├──────────────────┼──────────┼─────────┼──────────────────────┼──────────┤  │
│  │      368*        │          │  GROUP  │ 1  CUSTOMER SUPPORT  │    5     │  │
│  │      456*        │ Outgoing │CDR TABLE│ 5  MANUFACTURING     │    7     │  │
│  │                  │          │         │                      │          │  │
│  │                  │          │         │                      │          │  │
│  │                  │          │         │                      │          │  │
│  │                  │          │         │                      │          │  │
│  │                  │          │         │                      │          │  │
│  │                  │          │         │                      │          │  │
│  └──────────────────┴──────────┴─────────┴──────────────────────┴──────────┘  │
│                                                                                │
│       Save       Exit                                                          │
│                                                                                │
└────────────────────────────────────────────────────────────────────────────────┘

Press ENTER/CLICK to save all field edits (F10 or Alt S also saves)
```

Follow these steps to add an ANI/ICLID Number and Description, select Group, and prioritize the Line.

**ANI/ICLID Number** (required field)

**1** Type in **up to 10 alphanumeric characters**. Highlight the Description field.

This Number is what ACD designates as an Originating Number (ANI/ICLID) Call and will route the Line specified by Originating Number to the specified Group.  You can configure up to 1000 ANI Numbers.

You can use the **\*** (asterisk) Wildcard to substitute numbers (same as DOS wildcard use).

Example:

If you want to list 513 Area Code as ANI/ICLID routed numbers to a specific Group, type in **513\***

Wildcard Rules:  can be used at end of string and used to represent any digits 0-9 received after the first specified digits

**Description**

**2** Type in **up to 8 alphanumeric characters** to further identify the ANI/ICLID Number.

**Routing**

**3** Press **F2/DBL CLICK** and select either **Group** or **CDR Table**.

*Note: Make sure that the CDR Table has been previously configured.  Refer to Caller Directed Routing Number Configuration found under Line Configuration.*

**Group/CDR Table**

**4** Press **F2/DBL CLICK** and select **Group Number** or **CDR Table** from list.  When a call arrives with this ANI/ICLID Number, it will be routed to this Group or CDR Table.

**Priority**

**5** Press **F2/DBL CLICK**, highlight a **priority value (1-10)**, and press **ENTER/CLICK** to select.  This will prioritize the configured ANI/ICLID digits so that calls arriving can be handled at the rate you specify.

**6** When all screen information is completed, press the **F10 Key**  (or highlight Save and press ENTER/CLICK, or press ALT-S) to save this configuration.

Then select Update Configuration on the Configuration Menu to activate or schedule the update of these configuration changes.

*Note: You can update an existing ANI/ICLID Number by editing the row and then saving the changes. You can also delete an ANI/ICLID row by highlighting the ANI/ICLID Number  field and pressing the ALT-D keys simultaneously.*

## Caller Directed Routing Number Configuration (CDR)

**Caller Directed Routing** is an ACD 3.6 Add-On that enables the routing of incoming calls based on DTMF (Dual Tone Multi-Frequency or "touchtone dialing") digits entered by the caller. When a call is directed to a CDR Table, a Primary Announcement can be recorded to tell the caller to enter the CDR Number. The caller can enter up to 16 numeric characters and utilize a wildcard. For example, a CDR Number could be a credit card number, customer number, account number, order number, or any number used to represent the person or department the caller is trying to reach. After the CDR Number is entered, the call is then sent to a Group configured to answer these calls.

This CDR Number is configured in the CDR Table allowing the following parameters:

◗ **Table Number**

◗ **Table Number Description**

◗ **Caller Input Timeout**

◗ **Exception Group**

◗ **Caller Attempts**

◗ **Transfer DN**

◗ **Primary Announcement**

◗ **Secondary Announcement**

◗ **Digits to Collect**

◗ **Support No Digit Entry**

You can configure 3 CDR Tables with up to 1,000 CDR Numbers per table.

There are several ways a call can reach the appropriate CDR Table:

◗ **Line Configuration**

  All calls coming in on a specified Line (or Lines) can be routed directly to the CDR Table.

◗ **Destination Number Configuration**

  Calls with a DNIS or DID digit string designation can be routed directly to the CDR Table.

◗ **Originating Number Configuration**

  Calls with an ANI or ICLID digit string designation can be routed directly to the CDR Table.

◗ **Automated Attendant Routing Command**

  A Group can be configured to use an Automated Attendant command. In the Automated Attendant command, the CDR Table command is used as a routing step. When a call comes in on a Line (or Lines) assigned to this Group, the Automated Attendant's CDR Table Command sends the call to the specified CDR Table.

  An Automated Attendant Group (without Agents) can also be configured to use a CDR Table command as a routing step. When a call comes in on a Line (or Lines) assigned to this Group, the CDR Table command sends the call to the specified CDR Table

◗ **Group with CDR Table Routing Command**

  A Group can be configured to use a CDR Table command as a routing step. When a call comes in on a Line (or Lines) assigned to this Group, the CDR Table command sends the call to the specified CDR Table.

In this section steps are provided so you can perform the following tasks:

◗ Access the Caller Directed Routing Number Configuration (CDR) screen.

◗ Configure the CDR Table

◗ Add a CDR Number, Description, select a Group, and prioritize the call in queue.

◗ Import CDR information in .CSV format into the CDR Table.

Follow this step to access the Caller Directed Routing Number Configuration (CDR) screen from the Configuration Menu:

**1** On the **Configuration Menu**, highlight **Line** and press **ENTER/CLICK**. The Line Menu will display.

```
01/02/00  11:25:26 am            CINPHONY (123456)            7% Disk Full

  Status    Configuration    Reports    Maintenance    ACD Control   DOS-Shell

                    Agent
                    Group
                    Line
                   ┌──────────────────────────────────────┐
                   │ Route Order Configuration            │
                   │ Line Configuration                   │
                 ──│ Destination Number (DNIS/DID)        │
                   │ Originating Number (ANI/ICLID)       │
                   │ Caller Directed Routing (CDR)        │
                   │                                      │
                   │ Ca                                   │
                   ├──────────────────────────────────────┤
                   │ System Wide Parameters               │
                   │ Update Configuration                 │
                   ├──────────────────────────────────────┤
                   │ Menu Password                        │
                   │ Printer                              │
                   │ Wallboard                            │
                   │ Infocus Status Display               │
                   └──────────────────────────────────────┘


  Press ENTER/CLICK to display Line Configuration screen
```

Highlight **Caller Directed Routing (CDR)** on this menu and press **ENTER/CLICK** to display the Caller Directed Routing Number Configuration (CDR) screen.

```
01/02/99  11:26:48 am            CINPHONY (123456)            7% Disk Full

 S┌──────────■Caller Directed Routing Number Configuration (CDR)─────────┐
  │   Table              1     Table Description      CDR CALLS          │
  │   Caller Input Timeout  5  Exception Group   10   INSIDE SALES       │
  │   Caller Attempts    1     Transfer DN            312                │
  │   Primary Announcement 1   Secondary Announcement 2                  │
  │   Digits to Collect  7     Support No Digit Entry  Yes ( ) No ( )    │
  │  ┌──────────────┬────────┬─────────────────────┬───────────┐        │
  │  │  CDR Number  │  Desc  │       Group         │  Priority │        │
  │  ├──────────────┼────────┼─────────────────────┼───────────┤        │
  │  │  1234*       │ ORDERS │ 5 MANUFACTURING     │     7     │        │
  │  │              │        │                     │           │        │
  │  │              │        │                     │           │        │
  │  │              │        │                     │           │        │
  │  │              │        │                     │           │        │
  │  │              │        │                     │           │        │
  │  │              │        │                     │           │        │
  │  └──────────────┴────────┴─────────────────────┴───────────┘        │
  │      Save      Exit      Import       Delete                        │
  └─────────────────────────────────────────────────────────────────────┘
  Type in up to 10 characters; refer to Help <F1> for wildcard use
```

Follow these steps to configure the CDR Table:

**Table** (required field)

**1** Press the **F2 Key**, highlight the **Table Number (1, 2, or 3)** and press **ENTER/CLICK** to select.  Highlight the Table Description field.

**Table Number Description**

**2** Type in up to **20 alphanumeric characters** describing this Table.  Highlight the Caller Input Timeout field.


**Caller Input Timeout** (required field)

**3** Type in up to **2 numeric characters** for the timeout (range - 5 to 45 seconds, default - 20 seconds).  The Caller Input Timeout is the time period a caller is granted to enter the required digits for the current session starting after the first digit is entered.  If this time period expires, the caller can enter the digits again if Caller Attempts is given a value.  Highlight the Exception Group field.

**Exception Group** (required field)

**4** Press **F2/DBL CLICK** to display the list of configured Groups.  Highlight the **Group** and press **ENTER/CLICK** to select.  The call is sent to this Exception Group if the caller does not enter the correct digit string in the first or any additional attempts.   Highlight the Caller Attempts field.

**Caller Attempts** (optional field)

**5** Press **F2/DBL CLICK** to display **1**, **2**, or **3** as the number of attempts (default - 2).  Highlight the number and press **ENTER/CLICK** to select.  Caller Attempts is the chances a caller has to enter the correct digit string.  After the Primary Announcement, the caller completes the first attempt by entering in the appropriate digit string.  If this is an incorrect digit string, the Secondary Announcement will play telling the caller to re-enter the digit string.  You can, for example, select 3 attempts that would give the caller two chances to enter the correct digit string.   The Secondary Announcement will drive these last two attempts.

**Transfer DN** (optional field)

**6** Type in from **2 to 7 numeric characters** (range 2-9999999).  You can assign a Transfer DN to this CDR Table so that a call, for any reason, can be transferred to this CDR Table and the caller can start the process of entering a digit string.  Highlight the Primary Announcement field.

**Primary Announcement** (required field)

**7** Type in the **Announcement Number** for this Primary Announcement that was previously recorded on the **Station Set** using the **Announcement Maintenance feature**.  The Primary Announcement is designated as the announcement to give the caller directions to enter the appropriate digit string**.**   Refer to Chapter 3 - Using Norstar Station Sets, Announcement Maintenance, to record this announcement.

*Primary Announcement example without a Digits to Collect maximum:  "Thank you for calling ABC Company, please enter your code and then press the pound key.  Your call will be sent to the appropriate group.".*

*Primary Announcement example with a Digits to Collect maximum of 7:  "Thank you for calling ABC Company, please enter the seven digits for your code and your call will be sent to the appropriate group.".*

*Note:  The Primary Announcement will require a Voice Port.  If all Voice Ports are busy when a Primary Announcement is invoked to play, the call will be sent to the specified Exception Group.  If the Primary Announcement is played and the caller enters an incorrect digit string, a Secondary Announcement will play.  Refer to Secondary Announcement below.*

**Secondary Announcement** (optional field)

**8** Type in the **Announcement Number** for this Secondary Announcement that was previously configured on the **Station Set** using the **Announcement Maintenance feature**.  The Secondary Announcement is designated as the announcement to give the caller directions to re-enter the appropriate digit string.  This Secondary Announcement will replay to the number of times you have specified Caller Attempts (2 or 3).  If an incorrect digit string is entered for each specified retry, the call will be sent to the specified

Exception Group. Refer to Chapter 3 - Using Norstar Station Sets, Announcement Maintenance, to record this announcement.

***Secondary Announcement example:*** *"We are sorry, but the code you entered was incorrect.  Please try again.".*

***Note:*** *The Secondary Announcement will require a Voice Port.  If all Voice Ports are busy when a Secondary Announcement is invoked to play, the call will be sent to the specified Exception Group.  If a Voice Port can not be made available for a Secondary Announcement or if a Secondary Announcement has not been recorded, the call will be sent immediately to the specified Exception Group after the Primary Announcement has played and the caller has entered an incorrect digit string.*

**Digits to Collect** (optional field)

**9** Type in **up to 2 numeric characters** (range 1-16) for a set number of digits you want the caller to enter for a CDR Number.  Once the caller enters this number of digits, the call will be sent immediately to the specified Group without the caller ending the number sequence by entering the # (pound or number symbol).  If field is left as a 0 (zero), the maximum number of digits will default to 16.

***Examples:*** *The maximum length for all of the CDR Numbers your callers will use in this table is 7 digits.  In this case, it is best to enter the number 7 in the Digits to Collect field.  As soon as the seventh digit is entered, the call will immediately be sent to the specified Group.*

*There is no  maximum length of CDR Numbers your callers may use.  In this case, leave the default 0 (zero) in the Digits to Collect field.  When each caller enters their last digit of the CDR Number, they will also have press the # (pound or number) key to end the digit string and allow the call to be sent to the specified Group.*

**Support No Digit Entry** (optional field)

**10** Move cursor to highlight either **Yes** or **No** (default - Yes).  If, for example, a caller is using a rotary (analog) telephone instead of a touch-tone (digital) telephone, the caller will not be able to enter the digit string to send the call to the appropriate group.  In this case, you can select Yes (to support no digit entry) and the call will be sent to the specified Exception Group immediately after the Primary Announcement is played and the Digit Timeout period expires (Digit Timeout Period is specified on the System Wide Configuration screen).  If you select No (not to support no digit entry), the call will be sent to the Exception Group after the Primary Announcement Plays, the specified Digit Time Out period, and the time it takes to play the Secondary Announcements (maximum 2).

***Note:*** *To avoid  having calls sent to the Exception Group in this manner, make sure the callers that receive a CDR Number are using touch-tone telephones.*

**11** If all Table information is complete and CDR Numbers do not need to be added or edited, press the **F10 Key**  (or highlight Save and press ENTER/CLICK, or press ALT-S) to save this configuration.

Then select Update Configuration on the Configuration Menu to activate or schedule the update of these configuration changes.

Follow these steps to add a CDR Number, Description, select a Group, and prioritize the call in queue.

**CDR Number** (required field)

**1** Type in up to **16 numerical** characters for the CDR Number.  You can use an **\* (asterisk)** as a wildcard for the last number in the string.  For example, if you have ten CDR Numbers that are ten digits and all begin with 123, you can specify all ten of these numbers at one time by entering 123\*.

**Description** (optional field)

**2** Type in **up to 8 alphanumeric characters** to further identify the CDR Number or Numbers.

**Group** (optional field)

**3** Press **F2/DBL CLICK** and select the **Group Number** from list.  When the CDR Number (digit string) is accepted, the call will be sent to this Group.

*Notes:  ACD 3.6 allows up to 80 Groups to be configured.  Depending on the size of your Call Center, each  Agent can be assigned to a Group thus making each  Agent and Group synonymous.  Each Agent can also be assigned, along with other Agents, to other Groups.*

*Each Agent assigned as a Group can also be given a specific CDR Number.  For example,  a Customer Service Agent is the Group called Maintenance.  Customers (callers) are given a CDR Number of 1234. Notes:  When a customer enters 1234, the call is routed to the Maintenance Group and to this one Agent responsible for maintenance agreements.  Your entire Call Center can be set up in such manner.*

* As there are a maximum of 1000 CDR Numbers that can be configured, you can also assign a CDR Number to each Agent or Group in your Call Center that could represent their expertise.  For example, your customer base could receive a listing of all CDR Numbers as they correspond to the expertise of the Agent or Group.  The customer could then direct a call to a specific Agent or Group depending on the service needed.*

**Priority**

**4**    Press **F2/DBL CLICK**, highlight a **priority value (1-10)**, and press **ENTER/CLICK** to select.  This will prioritize the call in queue.

**5**    When all screen information is completed, press the **F10 Key**  (or highlight Save and press ENTER/CLICK, or press ALT-S) to save this configuration.

Then select Update Configuration on the Configuration Menu to activate or schedule the update of these configuration changes.

*Note: You can update an existing CDR Number by editing the row and then saving the changes.  You can also delete all of the information from a CDR Table by selecting the Delete button.*

***System Wide Parameters / Display on Station Set Note:***

*On the System Wide Parameters screen, you can select whether you want the Group, DNIS/DID Description, CDR Number, or CDR Description to display on the Agents'  Station Set when ACD Calls reach the Station Sets.  There are 4 types of configurations possible to help you make your selection:*

- *  **Group is default**.  When an ACD call has not been routed by Destination Number Configuration (DNIS/DID) or Caller Directed Routing Number Configuration (CDR), the Group to where the call was routed will display on the Station Set.*

- *  **Select Group or DNIS/DID Description**.  When you route an ACD call by Destination Number Configuration (DNIS/DID) to a Group, you have a choice of what is displayed on the set.*

- *  **Select Group, DNIS/DID Description, CDR Number or CDR Description**.  When you route an ACD call by Destination Number Configuration (DNIS/DID) to the CDR Table, you have a choice of what is displayed on the set.*

- *  **Select Group, CDR Number, or CDR Description**.  When you route an ACD call by Caller Directed Routing Number Configuration (CDR) to the CDR Table, you have a choice of what is displayed on the set.*

Follow these steps to **Import CDR information** (CDR Number, Description, Group Number, and Priority) into a CDR Table.

**1**    Make sure your records to import are in .CSV format (Comma Separated Values) and the file is copied to the CINPHONY Directory (default - C:\CINPHONY>).

Example:  CDR Number,Description,Group Number,Priority = 1,Sales,24,1

*Notes: If a CDR Number is missing  in any line you are trying to import, you will receive the following error message:  **Invalid or missing CDR Number** and the Import will be cancelled..  Check the log file in the CINPHONY Directory - **CDRIMP.LOG** to locate the error line(s).*

*If a Group Number is missing  in any line you are trying to import, you will receive the following error message:  **Invalid or missing Group Number** and the Import will be cancelled..  Check the log file in the CINPHONY Directory - **CDRIMP.LOG** to locate the error line(s)*

*If you do not provide a Description, make sure you provide the comma for the Description in the line. Using the example above, the line would be:  1,,24,1.*

*If you do not provide a Priority value, a default value of 5 will be provided.  Using the example above, the line would be: 1,Sales,24,5*

**2**  On the CDR Configuration screen, highlight the **Import** button and then press **ENTER/CLICK**.  Type in the name of the **.CSV file to be imported** and press **ENTER**.  The CDR information will be imported.

# Supervisor Configuration

When all Agents and Groups have been configured, you can configure the Supervisor(s) to manage these Groups and Agents.

There is 1 screen with 4 fields to complete when configuring a Supervisor:

◗ Supervisor ID

◗ Supervisor's Name

◗ Supervisor's Password for ACD Register

◗ Group Assignment

In this section steps are provided so you can perform the following tasks:

◗ Access the Supervisor Configuration screen.

◗ Add a Supervisor.

◗ Update existing Supervisor information.

◗ Delete a Supervisor.

Follow this step to access the Supervisor Configuration screen from the Configuration Menu:

**1** On the **Configuration Menu**, highlight **Supervisor** and press **ENTER/CLICK** to select.  The Supervisor Configuration screen will display.

```
01/02/99  11:28:57 am           CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell
                         ── Supervisor Configuration ──
       ID                                    Save
       Name
       Password      9999    TEST SUPERVISOR     ↑te

            ──Group



  Cursor keys scroll, <ENTER> selects and <ESC> exits choice menu
```

Follow these steps to add a Supervisor to the database:

**ID #** (required field)

**1** Type in **2, 3, or 4 numeric characters** for the Supervisor's identification number (maximum 9999). Highlight Name field.

*Note: Supervisor Configuration is not available for PRELUDE.  For CINPHONY I, you can add up to 6 Supervisors, assign 6 Groups to a Supervisor, and have 1 Supervisor per Group.  For CINPHONY II, you can add up to 80 Supervisors, assign 80 Groups to a Supervisor, and have 1 Supervisor per Group.*

**Name** (required field)

**2** Type in up to **20 alphanumeric characters** for Supervisor's name.  Highlight Password field.

**Password** (optional field)

**3** Type in up to **8 numeric characters** for Supervisor's password.  Highlight first Group Assignment field in region.

*Note:  The Supervisor will be prompted to enter the password when registering  (range 0-99999999).*

**Group Assignment**

**4** Press **F2/DBL CLICK**, highlight **Group(s)** you want to assign to this Supervisor, and press **ENTER/CLICK** to select.

*Note: While the Supervisor is registered, information and warning messages and help requests can be received from the Agents in the Groups selected.  Refer to Appendix 1 for a complete list of Supervisor messages.*

**5** When all screen information is complete and you are ready to add the Supervisor, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to save this configuration.

Then select Update Configuration on the Configuration Menu to activate or schedule the update of these Supervisor configuration changes.

Follow these steps to update existing Supervisor information:

**ID #**

**1** Type the **existing Supervisor's Identification Number** and press **ENTER/CLICK**.

(or)

Press the **F2/DBL CLICK** to display all Supervisors' Identification Numbers, highlight **Supervisor ID** and press **ENTER/CLICK** to select.

**2** All Supervisor information will display on the screen.  Edit any of the fields for this Supervisor.

**3** When all screen information is complete, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to Save the Supervisor configuration.  Then select Update Configuration on the Configuration menu to activate or schedule the update of these configuration changes.

Follow these steps to delete a Supervisor from database:

**ID #**

**1** Type the existing **Supervisor Identification Number** and press **ENTER/CLICK**.

 (or)

 Press the **F2/DBL CLICK**  to display all Supervisors' Identification Numbers, highlight **Supervisor ID** and press **ENTER/CLICK** to select.

**2** All Supervisor information will display on the screen.  Hold down the **ALT-D Keys** simultaneously (or highlight Delete and press ENTER/CLICK), select YES to confirm deletion, and the Supervisor will be deleted.

# Emergency Configuration

After you have configured all Agents and Groups, you can configure an Emergency Group to which all calls can be sent during an emergency situation or situations when Agents cannot answer calls (e.g., fire drills, company-wide meetings, etc.).

**Emergency Configuration** screen contains 3 fields:

◗ Group

◗ Group Description

◗ Password

In this section steps are provided so you can perform the following tasks:

◗ Access the Emergency Setup screen.

◗ Add an Emergency Group to the database.

◗ Change an Emergency Group Password.

◗ Delete an Emergency Group.

Emergency Routing is enabled/disabled by a Station Set programmable key or Feature Code. When Emergency Routing is enabled, a white asterisk in a red box displays in the upper right hand corner of the Main Menu.

Follow this step to access the Emergency Configuration screen from the Configuration Menu:

**1** On the Configuration Menu, move cursor to highlight **Emergency** and press **ENTER** to select. The next screen to display is the Emergency Configuration screen.

```
01/02/00  11:29:32 am         CINPHONY (123456)          7% Disk Full

   Status    Configuration    Reports    Maintenance   ACD Control   DOS-Shell

                    Agent
                    Group
                    Line
                    Supervisor
                              Emergency Configuration

                    Group Number    1                        Save
                    Description     CUSTOMER SUPPORT
                    Password        12345678                 Delete

                                                             Exit


                    Printer
                    Wallboard
                    Infocus Status Display


   Press F2/DBL CLICK and select Group from list
```

Follow these steps to add an Emergency Group to the database:

**Group/Description** (required field)

**1** Press **F2/DBL CLICK**, highlight **Group** to become Emergency Group, and press **ENTER/CLICK** to select. The Group Number and Description previously configured in Group Configuration will display. Highlight Password field.

Emergency Group is not available for PRELUDE.  For CINPHONY I & II, you can configure 1 Emergency Group.

**Password** (optional field)

**2** Type in **up to 8 numeric characters** for Password.  If Password is assigned, it must be entered at the Station Set before Emergency routing is enabled.

**3**  When all screen information is complete, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to Save the Emergency configuration.  Then select Update Configuration on the Configuration menu to activate or schedule the update of these configuration changes.

Follow these steps to change an Emergency Group Password:

**1** Display the **Emergency Group** on the screen.

**2** Move cursor to highlight the **Password** field.

**3** Use **editing keys to delete old Password** and then type in **new Password** (up to 8 numeric characters).

Follow these steps to delete an Emergency Group:

**1** Go to the Emergency Group Configuration screen; the current Emergency Group is displayed.

**2** Press the **ALT-D Keys** simultaneously (or highlight Delete and press ENTER/CLICK) to delete the Emergency Group (record) from the database.

*Note: Emergency Group routing of all ACD calls is turned ON or OFF at any station set via the feature code.*

# Recorded Announcement

When an Announcement is recorded at a Station Set by a Supervisor, you can utilize this feature to add a Description to the Recorded Announcement.

You can record up to 240 announcements.

When you use the ANNOUNCEMENT Command on a Routing Command table, you will need to enter the number of the Recorded Announcement you want to play. A Description facilitates identifying these Recorded Announcements when you need to enter the Announcement Number.

In this section steps are provided so you can perform the following tasks:

◗ Access the Recorded Announcement screen.

◗ Add a Description.

◗ Update a Description.

Follow this step to access the Recorded Announcement screen from the Configuration Menu:

**1** On the Configuration Menu, highlight **Recorded Announcement** and press **ENTER/CLICK** to select. The **Recorded Announcement** screen will display.

```
01/02/00  11:30:01 am          CINPHONY (123456)          7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

              Agent
              Group
              Line
              Supervisor
              ┌──── Recorded Announcement Configuration ────┐
              │                                             │
              │  Number       2                  Save       │
              │                                             │
              │  Description   SERVICE ANNOUNCEMENT          │
              │                                  Delete      │
              │                                             │
              │                                  Exit        │
              │                                             │
              └─────────────────────────────────────────────┘
              Printer
              Wallboard
              Infocus Status Display


 Press F2/DBL CLICK, highlight Announcement Number, and press ENTER/CLICK
```

Follow these steps to add a Description to a Recorded Announcement Number:

**Number** (required field)

**1** Press **F2/DBL CLICK**, highlight Recorded Announcement Number, and press **ENTER/CLICK** to select. The Description field is highlighted.

**Description** (optional field)

**2** Type in **up to 20 alphanumeric characters** that describes the Recorded Announcement.

*Note: This information will display on the System Configuration Report.*

**3** When all screen information is complete, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to Save the Recorded Announcement configuration.

Follow these steps to update a Description:

**1** Press **F2/DBL CLICK**, highlight Recorded Announcement Number, and press **ENTER/CLICK** to select. The Number will display with its Description (if it was added previously).

**2** Use an **editing key to delete the old Description** and type in **new Description** (or enter the Announcement Number, select Delete, and the Description (not the Announcement) is deleted*.).*

**3** When completed, **Save** this new Description.

*Note: A Recorded Announcement can be deleted using the Report/File Maintenance option. Select this option from the Reports Menu.*

# Voice Port Configuration

Voice Port DNs are automatically configured by ACD when the processor boots up.  If the Voice Port DNs are changed on the Norstar, you only need to select Reconfigure and the new DNs will display.

There is 1 screen with 1 field to complete  to reserve a Voice Port:

Follow these steps to access the Voice Port Configuration screen from the Configuration Menu, and then reconfigure the Voice Ports reserved for Recorded Calls:

**1**   On the **Configuration Menu**, highlight **Voice Port** and press **ENTER/CLICK** to select.  The **Voice Port Configuration screen** will display.

```
 01/02/99  11:30:18 am          CINPHONY (123456)          7% Disk Full

                        ▪Voice Port Configuration▪                 Shell
   ┌─────────────────────────────────────────────────────────────┐
   │ Port│DN Numbers│Port│DN Numbers│Port│DN Numbers│Port│DN Numbers│
   │                                                              │
   │  01    229       09   256       17   UNUSED     25   UNUSED  │
   │  02    357       10   378       18   UNUSED     26   UNUSED  │
   │  03    231       11   260       19   UNUSED     27   UNUSED  │
   │  04    259       12   380       20   UNUSED     28   UNUSED  │
   │  05    238       13   UNUSED    21   UNUSED     29   UNUSED  │
   │  06    366       14   UNUSED    22   UNUSED     30   UNUSED  │
   │  07    240       15   UNUSED    23   UNUSED     31   UNUSED  │
   │  08    372       16   UNUSED    24   UNUSED     32   UNUSED  │
   │                                                              │
   │   ┌──────────────────────────────────┐                      │
   │   │ Record Calls Reserved Ports  0   │                      │
   │   └──────────────────────────────────┘                      │
   │                                                              │
   │                     Save      Reconfigure    Exit            │
   └─────────────────────────────────────────────────────────────┘

 Cursor keys scroll, <ENTER> selects and <ESC> exits choice menu
```

**Record Call Reserved Ports** (CINPHONY Levels I and II only)

**2**   Press **F2/DBL CLICK,** highlight **Number**, and press **ENTER/CLICK** to select.

**3**     When all screen information is complete, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to save Voice Port configuration.

**4**   Press **Reconfigure**.

*Notes: If, for example, there are 4 Ports with Directory Numbers and the remaining Ports are UNUSED, you can only reserve 3 of the Ports for Recorded Calls.  One of the DNs must always be reserved for playing Recorded Announcements.*

*The number of ports reserved for Recorded Calls are not used to play Announcements. If you have 4 Voice Ports, reserve 3 for recording calls.  Only 1 port is used to play announcements to callers.  The other 3 Voice Ports remain IDLE at all times waiting to be used for recording calls.*

# Call Categorization

When an ACD Call is completed by an Agent and the Prompted Categorization feature is set to YES, the Agent is prompted at the Station Set to enter a Call Category Number. If Prompted Categorization is NO, the Agent is not prompted but can still use the Station Set feature code to enter this Categorization Number during Wrap Duration.

The Call Categorization feature allows you to assign a Category Number and a Description to the types of calls an Agent receives. The Category Code does not have to be configured to be used; however, if you want a Description to display on Reports, the Category Number should be configured. 10,000 Codes and Descriptions can be added.

The Call Categorization Report will display the Description with the Category Number to facilitate the identification of calls.

In this section steps are provided so you can perform the following tasks:

◗ Access the Call Category Configuration screen.
◗ Add a Call Category Number and Description.
◗ Update a Call Category Number and Description.
◗ Delete a Call Category Number (Record).

Follow this step to access the Call Categorization screen from the Configuration Menu:

1 On the **Configuration Menu** highlight **Call Categorization** and press **ENTER/CLICK**. The **Call Category Configuration screen** will display.

```
01/02/00  11:30:49 am          CINPHONY (123456)           7% Disk Full

   Status   Configuration    Reports   Maintenance    ACD Control   DOS-Shell

                    Agent
                    Group
                    Line
                    Supervisor
                           Call Category Configuration
                                                                 Save
             Category Number   100100
                                                                 Delete
             Description       HARDWARE SERVICE
                                                                 Exit


                    Printer
                    Wallboard
                    Infocus Status Display


 Type in up to 12 numbers, or press F2/DBL CLICK and select from list
```

Follow these steps to add a Call Category Number and Description:

**Category Number** (required field)

1 Type in **up to 12 numeric characters** and press **ENTER/CLICK**. Highlight Description field.

**Description** (optional field)

2 Type in **up 30 alphanumeric characters** that describe the Call Category.

3 When all screen information is complete, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to Save the Call Category configuration.

Follow these steps to update a Call Category Number and Description:

**1** Type in **Call Category Number** and press **ENTER/CLICK**.

(or)

Press **F2/DBL CLICK**, highlight **Category Number**, and press **ENTER/CLICK** to select.  The Number and Description (if specified) will display.

**2** Use editing keys to **delete Number and/or Description** and type in **new information**.

**3** When completed, **Save** this information.

Follow these steps to delete a Call Category Number (Record):

**1** Type in **Call Category Number** and press **ENTER/CLICK**.

(or)

Press **F2/DBL CLICK**, highlight **Category Number**, and press **ENTER/CLICK** to select.  The Number and Description (if specified) will display.

**2** Press the **ALT-D Keys** simultaneously (or highlight delete and press ENTER/CLICK), select YES to confirm deletion, and the Category Number (Record) will be deleted.

# System Wide Parameters

On the System Wide Parameters screen you can specify the following settings:

◗ **PRI/ICLID Delay Time**

If Delay on the Line Configuration screen is set to Yes, the time you specify in this field will be the actual delay time.

◗ **Backup Station Set DN**

This is the Directory Number you can assign to your Backup Station Set.  A Backup Station Set is required to take incoming calls if ACD becomes unavailable.  This Set must have all ACD lines assigned to it, and it cannot be assigned to an Agent.  At least 1 Station Set should be dedicated as backup.

* M7310 or M7410:  can be used for a Call Center with 1-8 lines.

* M7324:  if a Call Center utilizes more than 24 lines, this dedicated Set may need a CAP module attached.

◗ **Login/Logout DN** and **Available/Unavailable DN** (Analog Station Set Parameters)

If you are using 2500-Compatible Analog Station Sets, you must specify the DN (Directory Number) you will use to Login and Logout and the DN you will use to go Available and Unavailable.

◗ **Indicator FlashRate 1** and **Indicator FlashRate 2**

When a call is in queue, the Login Indicator light on the Station Set will flash.  There are 3 flash speeds: Initial Rate, Rate 1, and Rate 2.  The Initial Rate changes after the number of calls in queue exceeds the number specified in Rate 1.  Rate 1 changes after the number of calls in queue exceeds Rate 2.  You can set these FlashRate break points.

◗ **Digit Timeout** and **Port Timeout**

The Automated Attendant Routing Command Add-On or the Caller Directed Routing Add-On must be installed before these features can be used.

Digit Timeout is the time a user has to press a key on the Station Set before the AUTO ATTD's NONE Step sends call to specified command after the announcement has played completely.  The NONE step and command value are specified with each AUTO ATTD Menu.  For Caller Directed Routing, the Digit Timeout is the time a user has to press a key on the Station Set after the Primary Announcement has played and, if applicable, after each Secondary Announcement is played.

Port Timeout is the time a caller is kept waiting to hear an AUTO ATTD announcement if no ports are available to play the announcement.  After the time specified, the call is routed according to the No Port command specified for each Automated Attendant configured and continues to be routed accordingly.

◗ **Display on Station Set**

You can select whether you want the Group, DNIS/DID Description, CDR Number, or CDR Description to display on Agents'  Station Set when ACD Calls reach the Station Sets.  There are 4 types of configurations possible to help you make your selection:

* **Group is default**.  When an ACD call has not been routed by Destination Number Configuration (DNIS/DID) or Caller Directed Routing Number Configuration (CDR), the Group to where the call was routed will display on the Station Set.

* **Select Group or DNIS/DID Description**.  When an ACD call is  routed by Destination Number Configuration (DNIS/DID) to a Group.

* **Select Group, DNIS/DID Description, CDR Number or CDR Description**.  When an ACD call is routed by Destination Number Configuration (DNIS/DID) to the CDR Table.

* **Select Group, CDR Number, or CDR Description**.  When an ACD call is routed by Caller Directed Routing Number Configuration (CDR) to the CDR Table.

◗ **Duration**

- You can specify the length of time you want Group, DNIS/DID Description, CDR Number, or CDR Description to display on Agents' Station Sets.

In this section steps are provided so you can perform the following tasks:

◗ Access the System Wide Parameters screen

◗ Specify a PRI/ICLID Delay Time

◗ Specify a Backup Station Set DN

◗ Specify Login/Logout DN

◗ Specify Available/Unavailable DN

◗ Specify Indicator FlashRate1 and FlashRate2

◗ Specify Digit Timeout

◗ Specify Port Timeout

◗ Select Group, DNIS/DID Description, CDR Number, or CDR Number Description to display on the Station Set and the duration you want this information to display.

Follow this step to access the System Wide Parameters screen from the Configuration Menu:

**1** On the **Configuration Menu** highlight **System Wide Parameters** and press **ENTER/CLICK** to display the **System Wide Parameters** screen.

```
08/02/01  11:31:32 am          CINPHONY (123456)              7% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell

                    Agent
                    Group
                        System Wide Parameters
      ┌──────────────────────────────────────────────────┐
      │  PRI/ICLID Delay Time       5        Save         │
      │                                                   │
      │  Backup station set DN      232                   │
      │                                                   │
      │  Login/Logout DN                     Exit         │
      │  Available/Unavailable DN                         │
      │                                                   │
      │  Indicator FlashRate1       6                     │
      │  Indicator FlashRate2       11                    │
      │                                                   │
      │  Digit Timeout              5                     │
      │  Port  Timeout              20                    │
      │                                                   │
      │  Display on Station Set                           │
      │    Group                    ( )                   │
      │    DNIS Description          ( )                  │
      │    CDR Number                ( )                  │
      │    CDR Number Description    ( )                  │
      │  Duration                   00:30                 │
      └──────────────────────────────────────────────────┘



   Press ENTER/CLICK to return to Configuration menu (ESC or Alt X also exits)
```

Follow these steps to **specify the PRI/ICLID Delay Time:**

**1** Highlight the **PRI/ICLID Delay Time** field.

**2** Type in the **Time value** from 1 to 10 seconds.  The default is 5 seconds.

**3** If this is the only edit on this screen, **Save** this information.

*Notes:  Refer to Line Configuration screen to enable (YES) or disable (NO) Delay for a Line.*

*Although ANI accompanies ICLID as a selection, you are only setting a delay for ICLID Calls when NONE is specified as Line/Routing.*

*If ICLID is set to YES and DELAY ANSWER is used as first routing command step, DELAY ANSWER duration must be greater than the PRI/ICLID Delay Time specified.*

*If ORIG is specified as Line Routing and DELAY ANSWER is used as first routing command step, DELAY ANSWER duration must be greater than the PRI/ICLID Delay Time.*

Follow these steps to **specify the Backup Station Set DN:**

**1** Highlight the **Backup Station Set DN** field.

**2** Type in the **2 to 7 numeric characters for DN (extension)**.

**3** If this is the only edit on this screen, **Save** this information.

*Note: If you are using more than 1 Backup Station Set, you only need to enter 1 of the DNs in this field.*

Follow these steps to specify Login/Logout DN and Available/Unavailable DN:

**Login/Logout DN**

**1** Highlight the **Login/Logout DN** field.

**2** Type in **2 to 7 numeric characters** for DN.

*Notes: When entering a DN, make sure you do not duplicate a DN used for a Norstar Station Set, a Group Transfer DN, or a Voice Port.*

*Refer to this User Guide, Using Norstar Station Sets chapter, Using Analog Station Sets section for directions on Login, Logout, Available, and Unavailable.*

*Refer to the Norstar PRELUDE and CINPHONY ACD Installation Guide for directions to install 2500 Analog Station Sets.*

**Available/Unavailable DN**

**3** Highlight the **Available/Unavailable DN** field.

**4** Type in **2 to 7 numeric characters** for DN.

**5** If these are the only fields to edit on this screen, **Save** this information.

*Notes: Refer to Using Analog Station Sets section in the Using Norstar Station Sets Chapter for directions on Login, Logout, Available, and Unavailable. Refer to your Analog Station Set manual and/or the ATA manual for directions on using its standard features.*

Follow these steps to specify Indicator FlashRate1 and FlashRate2 for calls in queue.

**Indicator FlashRate1**

**1** Highlight Indicator FlashRate1 field. Type in **up to 2 numeric characters** for medium rate (maximum 80; must be 2 or more). Highlight Indicator FlashRate2 field.

**Indicator FlashRate2**

**2** Type in **up to 2 numeric characters** for medium rate (maximum 80; must be greater than FlashRate1).

All calls in queue over FlashRate2 will cause the Indicator to flash at the fastest speed.

**3** If these are the only fields to edit on this screen, **Save** this information.

Follow these steps to specify Digit Timeout and Port Timeout:

**Digit Timeout**

**1** Highlight Digit Timeout field. Type in **1 to 2 numeric characters** for Digit Timeout (range 1-99 seconds; default is 5 seconds). Highlight Port Timeout field.

**Port Timeout**

**2** Type in **1 to 2 numeric characters** for Port Timeout (range 1-99 seconds; default is 20 seconds).

**3** If these are the only fields to edit on this screen, **Save** this information.

*Note: If all Ports are busy and you want to send the call to the Routing Table, remember that the Voice Ports may still be in use; therefore, an ANNOUNCEMENT Command in the Routing Table will hold the call until a Port is available.*

Follow this step to select the information you want to display on all of the Agents' Station Sets:

**Group**

**DNIS/DID Description**

**CDR Number**

**CDR Number Description**

**1** Use the cursor keys to highlight either the **Group**, **DNIS/DID Description**, **CDR Number**, or **CDR Number Description** checkbox and then press **ENTER** to checkmark.  Or click on the checkbox to checkmark.  If no selection is made, Group is the default.

There are 4 types of configurations possible to help you make your selection:

- **Group is default**.  When an ACD call has not been routed by Destination Number Configuration (DNIS/DID) or Caller Directed Routing Number Configuration (CDR), the Group to where the call was routed will display on the Station Set.

- **Select Group or DNIS/DID Description**.  When an ACD call is  routed by Destination Number Configuration (DNIS/DID) to a Group.

- **Select Group, DNIS/DID Description, CDR Number or CDR Description**.  When an ACD call is routed by Destination Number Configuration (DNIS/DID) to the CDR Table.

- **Select Group, CDR Number, or CDR Description**.  When an ACD call is routed by Caller Directed Routing Number Configuration (CDR) to the CDR Table.

**Duration**

**2** Type in the **length of time** (format – mm:ss) you want **Group**, **DNIS/DID Description**, **CDR Number**, or **CDR Description** to appear on Agents' Station Sets.

# Update Configuration

This utility allows you to complete the configuration process for changes made to the following Configuration screens:

◗ Agent

◗ Group

◗ Supervisor

◗ Emergency Group

◗ Line

You can **Activate Changes** immediately or **Schedule Changes** for a later date and time.

In this section steps are provided so you can perform the following tasks:

◗ Access the Update Configuration screen.

◗ Activate Configuration changes for update immediately.

◗ Schedule Configuration changes for update at a later date and time.

Follow this step to access the Update Configuration screen from the Configuration Menu:

**1** On the **Configuration Menu** highlight **Update Configuration** and press **ENTER/CLICK** to display the Update Configuration screen.

```
01/08/00   9:15:51 am         CINPHONY (112233)           19% Disk Full

   Status   Configuration    Reports   Maintenance    ACD Control     DOS-Shell

              Agent
              Group
              Line
                          Update Configuration
                                                              Exit
        Last Reconfigured :    01/05/00      03:02 pm

        Activate Changes              Schedule Changes


              Menu Password
              Printer
              Wallboard
              Infocus Status Display


Press ENTER/CLICK to return to Configuration Menu (ESC or Alt X also exits)
```

Follow this step to activate Configuration changes for update immediately:

**1** Highlight the **Activate Changes** button and press **ENTER/CLICK**.  This message will then display: **Configuration changes will now take effect.**

Follow these steps to schedule Configuration changes for update at a later date and time:

**1** Highlight the **Schedule Changes** button and press **ENTER/CLICK**.  The **Schedule Date** and **Schedule Time** menu will display.

```
01/08/00    9:21:01 am        CINPHONY (112233)            19% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell
  ┌─────────────┬──────────────────────────────────────┐ █
  │             │ Agent                                 │ █
  │             │ Group                                 │
  │             │ Line                                  │
  │     ┌───────┴─────── Update Configuration ──────────────────┐
  │     │                                            ┌──────────┐│
  │     │                                            │   Exit   ││
  │     │  Last Reconfigured :  │ 12/08/98    09:18 am │        ││ █
  │     │              ┌────── Schedule Changes ──────┐│        ││ █
  │     │      Acti    │                              │ OK      ││ █
  │     │              │  Schedule Date    MONDAY     │          │ █
  │     │              │  Schedule Time    08:00 AM   │ Cancel   │ █
  │     │              │                              │          │ █
  │     │              └──────────────────────────────┘          │ █
  │     └──────┬───────────────────────────┐ ███████████████████┘ █
  │            █  Wallboard                 │ ████████████████████████
  │            █  Infocus Status Display    │
  │            █████████████████████████████┘
  │                 ████████████████████████
  │
  │ Press ENTER/CLICK to confirm current field edits (F10 or Alt O also confirms)
  └──────────────────────────────────────────────────────────────────────────────
```

**2**  Highlight **Schedule Date**, press **F2/DBL CLICK**, highlight **Date**, and press **ENTER/CLICK** to select.

**3**  Highlight **Schedule Time**, press **F2/DBL CLICK**, highlight **Time**, and press **ENTER/CLICK** to select.

**4**  Highlight **OK** and press **ENTER/CLICK** to confirm Date and Time (or press **F10 key**).  You will be returned to the Configuration Menu and Configuration changes will be scheduled for update.

*Note:  If you have opted to schedule changes at a later date and time, this message will display on the Main Menu until changes take effect: "Configuration changes pending".*

# Menu Password

You can restrict access to the **Reports Menu**, **Configuration Menu**, **Maintenance Menu**, **ACD Control**, and **DOS-Shell**.  Once password protecting a menu, you will be asked to type in the Password Name when you try to access this menu and use the operation at a later date.

In this section steps are provided so you can perform the following tasks:

◗ Access the Password Configuration screen.

◗ Password protect the Reports Menu, Configuration Menu, Maintenance Menu, ACD Control, and DOS-Shell.

◗ Update a Password.

   *Note: You may want to first Password protect the Configuration Menu to protect the Password names you enter on the Password Configuration screen.*

Follow this step to access the Password Configuration screen from the Configuration Menu:

**1**   On the **Configuration Menu** highlight **Menu Password** and press **ENTER/CLICK** to display the **Password Configuration** screen.

```
01/02/00  11:32:06 am        CINPHONY (123456)        7% Disk Full

  Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                    Agent
                    Group
                    Line
                    Supervisor
                    Emergency

                    ── Password Configuration ──
                                                        Save
  Menu Selection
                                                        Exit
  Password          Configuration            ↑
                    Maintenance
                    Reports
                    ACD Control
                    DOS-Shell               ↓
                Prin
                Wall
                Infocus Status Display ▪


Cursor keys scroll, <ENTER> selects and <ESC> exits choice menu
```

Follow these steps to add a Password to a Menu and/or Screen:

**Menu Selection** (required field)

**1**   Press **F2/DBL CLICK**, highlight **Menu item**, and press **ENTER/CLICK** to select  The Password field will be highlighted.

**Password** (required field)

**2**   Type in up to **10 alphanumeric characters** for name or number.

**3**   When you have completed entering a Password, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to Save the Password.  Follow the same steps if you want to continue to Password protect.

Follow these steps to update a Password:

**1**   Press **F2/DBL CLICK** and select Menu item from list.

**2**   Use editing keys to delete the old Password, and then type in new Password.

**3**   When completed, **Save** this information.

# Printer Configuration

A Printer is optional. If shipped with the Applications Module, it will be configured and ready to print ACD reports as soon as it is properly connected to the Applications Module. If you decide to use a different Printer, you must complete the information on the Printer Configuration screen. This screen provides a list of Printers from which to select; however, if you enter in a Printer not on the list, you will need to refer to the Printer manual for its codes.

In this section steps are provided so you can perform the following tasks:

◗ Access the Printer Configuration screen.

◗ Select a Printer from list.

◗ Specify a Printer not on list.

Follow this step to access the Printer screen from the Configuration Menu:

1 On the **Configuration Menu** highlight **Printer** and press **ENTER/CLICK** to display the **Printer Configuration** screen.

```
01/02/00  11:32:30 am          CINPHONY (123456)              7% Disk Full

    Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

               Agent                              ■
                             ─── Printer Configuration ───
         Printer Port          LPT1                              Save
         Printer Name          Panasonic KX-1180
                                                                 Exit
         Page Length           AEG Olympia 24-pin Models (B/W) ↑
         Form Feed             AEG Olympia 24-pin Models (B/W)
         Condensed Print Codes AEG Olympia Laserstar 6
         Normal Print Codes    ATT 495 Laser Printer
                               Acer LP-76
                               Alps 24-pin Models (B/W)
                               Alps 24-pin Models (Color)
            Menu Password      Alps 8-pin Models (B/W)
            Printer            Alps 8-pin Models (Color)
            Wallboard          Brother HL Series
            Infocus Status D   Brother M-1000/1100 Series
                               Brother M-1909 (B/W)
                               Brother M-1909 (Color)         ↓

Cursor keys scroll, <ENTER> selects and <ESC> exits choice menu
```

Follow these steps to select a Printer from list:

**Printer Port** (required field)

1 Press **F2/DBL CLICK**, highlight either **LPT1** or **LPT2** (the parallel port where your printer is connected), and press **ENTER/CLICK** to select. Highlight Printer Name field.

   *Note: LPT1 is the default Printer Port to which the Security is attached. LPT2 Printer Port is also available for use if you are supporting another application to which you want to output ACD Report information.*

**Printer Name** (required field)

2 Press **F2/DBL CLICK**, highlight **Printer**, and press **ENTER/CLICK** to select. The remaining information for this Printer will display on the screen.

3 When the Printer is selected and all related information is complete, press the **F10 Key** to Save this information.

Follow these steps to specify Printer not on the list:

**Printer Port** (required field)

**1** Press **F2/DBL CLICK**, highlight either **LPT1** or **LPT2** (the parallel port where your printer is connected), and press **ENTER/CLICK** to select.  Highlight Printer Name field.

**Printer Name** (required field)

**1** Type in **up to 31 alphanumeric characters** for name of Printer.  Highlight Page Length field.

**Page Length** (required field)

**2** Type in **up to 3 numeric characters** (range 1-999) and press **ENTER/CLICK**.  Highlight Form Feed field.

*Note: Page Length is the number of lines printed on each page.  60 lines allows for a 1/2 inch top and bottom margin.*

**Form Feed** (required field, YES/NO)

**3** Use **Right or Left Arrow keys** to move checkmark to **YES** or **NO** field, or you can **CLICK** on YES or NO field.  Highlight Condensed Print Codes field.

*Note: YES - If Form Feed is set to YES, Page Length should be set to 60 lines.  After the Printer has printed 60 lines of a Report, it will feed the remaining page and start printing at the top of the next page. NO - If Form Feed is set to NO, Page Length should be set to 66 lines.  After the Printer has printed 66 lines of a Report, it will feed the remaining page and start printing at the top of the next page.*

**Condensed Print Codes** (optional field)

**4** Type in **up to 3 numeric characters** (ASCII decimal value) in each field requiring a code.  Highlight Normal Print Codes field.

*Note: Refer to your printer manual to enter codes.  ACD sends these codes to the Printer before printing a Report.  These codes are used to define 132-column condensed mode, carriage return, and line feed.*

**Normal Print Codes** (optional field)

**5** Type in **up to 3 numeric characters** (ASCII decimal value) in each field requiring a code.

*Note: Refer to your printer manual to enter codes.  ACD sends these codes to the Printer before printing a Report.  These codes are used to reset Printer to normal default settings.*

**6** When the Printer is selected and all related information is complete, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S)  to Save this information.

*ACD Security Key Note:  this is an Input/Output Device attached to the parallel printer port cable.  If you switch printers, make sure this cable and key are connected properly or ACD will not boot up correctly.*

*HP LaserJet 6L Printer Note:  If you are using this Printer, refer to Appendix 5: Tips and Hints, HP LaserJet 6L Printer Driver Installation, in this guide for details.*

# Wallboard Configuration

If you have installed the Wallboard Add-On, you will need to configure the Wallboard. Refer to the Norstar PRELUDE and CINPHONY ACD 3.6 Installation Guide for directions to enable the Wallboard hardware and software.

Follow these steps to configure the Wallboard:

**1** On the **Configuration Menu** highlight **Wallboard** and press **ENTER/CLICK** to display the Wallboard Configuration screen.

**Model**

**2** Highlight Model and press the **F2 Key** to display the 3 types of Models: 4200R, 4120R, and 215R. Highlight the **Model** and press **ENTER/CLICK**. If you have previously installed and configured one Model of Wallboard and now have switched to the other, you need to follow these steps:

- Select new Model on Wallboard Configuration screen and then Save this information.
- On the Main Menu, select ACD Control.
- On the ACD Control Menu, select Deactivate and then Activate.

*Models and Description:*

- *215R - single line display, 15 characters (Norstar Applications Module only)*
- *4120R - double line display, 20 characters(default)*
- *4200R - double line display, 32 characters*

**Format**

You can specify the Format of statistics you want to calculate and display on the Wallboard for all Groups or selected Groups. You can also specify the individual Group statistics you want to calculate and display. After you select the System or Group, you can specify a Duration (e.g., the time you want to display statistics for a Group before displaying the next Group).

**3** Use the **Right** and **Left Arrow Keys** to move checkmark to the **Format** you want to display: **Average Answer and Average Abandon** or **Answered and Abandoned**. Press **ENTER/CLICK** to select the checkmarked format.

**4** To select the type of **SYSTEM STATISTICS** you want displayed, move cursor to highlight the **Display** field, press the **F2/DBL CLICK**, move cursor to highlight **YES-CALC ALL GROUPS**, **YES-CALC SELECTED GRPS**, or **NO** (for do not display System Statistics) and then press **ENTER/CLICK**.

*Note: YES-CALC ALL GROUPS enables you to display System statistics that include all Groups configured; YES-CALC SELECTED GRPS enables you to display System statistics for only the Groups you select to display on the Wallboard Configuration screen. Statistics include: format 1- number of calls in queue, longest time of call in queue, average time to answer call, and average time to abandon call; or format 2 - number of calls in queue, longest time of call in queue, number of calls answered and number of calls abandoned .*

**5** To select a **Group's Statistics** to display on the Wallboard panel, move cursor to highlight the **Display** field for the Group, press **F2/DBL CLICK**, move cursor to highlight **YES** (or **NO**) and press **ENTER/CLICK**.

**6** To specify a **Display Duration** for the **System** or **Group(s)**, move the cursor to highlight the **Duration** field and type in the **number of Seconds (3 to 99)**. The Duration is the time the statistics for each group selected displays on the Wallboard before displaying the next selected Group's statistics.

**7** When completed, press the **F10 Key** to **Save** this configuration.

*Note: The Port Settings field on the screen displays the COM (Serial) Port and Baud Rate required for the Wallboard.*

*Trouble Shooting:*  *If the Wallboard does not produce a display, make sure you check the following:*

- *Cabling is connected properly.*
- *PC and Wallboard power cords are connected properly.*

# Wallboard Displays (Examples)

## 4200R - Average Statistical Display and Totals Statistical Display

| GROUP | QUE | TIQ | AV-AN | AV-AB |
|---|---|---|---|---|
| (GRP NAME) | 4 | 0:45 | 0:32 | 1:22 |

GROUP NUMBER or SYSTEM (1st line)  GROUP NAME (2nd line)

QUE = Number of Calls in Queue

TIQ = Call in queue for the longest time

AV-AN = Average time it took Agents to answer calls

AV-AB = Average time it took Callers to abandon calls

| GROUP | QUE | TIQ | ANSWD | ABAND |
|---|---|---|---|---|
| (GRP NAME) | 4 | 0:45 | 67 | 6 |

ANSWD = Total calls answered by Agents

ABAND =  Total calls abandoned by Callers

## 4120R - Average Statistical Display and Totals Statistical Display

| GP | QC | TIQ | A-AN | A-AB |
|---|---|---|---|---|
| # | 4 | 0:45 | 0:32 | 1:22 |

GP (Group) or SY (System) (1st line)  Group Number (2nd line)

QC = Number of Calls in Queue

TIQ = Call in queue for the longest time

A-AN = Average time it took Agents to answer calls

A-AB = Average time it took Callers to abandon calls

| GP | QC | TIQ | ANSW | ABAN |
|---|---|---|---|---|
| # | 4 | 0:45 | 67 | 6 |

ANSW = Total calls answered by Agents

ABAN =  Total calls abandoned by Callers

## 215R - Calls Queued, Time in Queue, and Number of Unavailable Agents

| 1 | 4 | 0:45 | 2 |
|---|---|---|---|

Group Number or SY (1st line, 1st position)

0 = Number of Calls in Queue (2nd position)

0:00 = Call in queue for the longest time (3rd position)

0 = Number of Agents currently Unavailable (4th position)

(Norstar Applications Module only)

## Calculations: Formula and Examples

The System average times will be calculated as follows:

$$t(sys) = \frac{\{\Sigma\,[N(grp)\ \times\ t(grp)]\}}{N(sys)}$$

Where (sys) and (grp) indicate System and Group quantities, N is the number of answered/abandoned calls, t is the average time to answer/abandon, and the summation ($\Sigma$) is over all groups.

**Example 1 Answered Calls:**

| Group (selected) | Total Calls Answered N (grp) | Time to Answer t (grp) |
|---|---|---|
| Group 1 | 100 calls | 25 seconds |
| Group 2 | 50 calls | 32 seconds |
| Group 3 | 25 calls | 41 seconds |

**Average Time to Answer Calls for Selected Groups:**

**Formula:** $\dfrac{(N(1)\ \times\ t(1))\ +\ (N(2)\ \times\ t(2))\ +\ (N(3)\ \times\ t(3))}{N(1)\ +\ N(2)\ +\ N(3)}$

**Calculation:** $\dfrac{(100\ \times\ 25)\ +\ (50\ \times\ 32)\ +\ (25\ \times\ 41)}{(100\ +\ 50\ +\ 25)}$

**Avg. Time to Answer = 29.28 Seconds**

**The Wallboard will display - 0:29**

> *Note: If you selected YES-CALC ALL GROUPS but only selected 2 out of 3 Groups, for example, the Avg. Time to Answer (and Avg. Time to Abandon) is still calculated over all Groups. If you selected YES-CALC SELECTED GRPS, the Avg. Time to Answer (and Avg. Time to Abandon) is only calculated for the selected Groups.*

**Example 2 Abandoned Calls:**

| Group (selected) | Total Calls Abandoned N (grp) | Time to Abandon t (grp) |
|---|---|---|
| Group 1 | 5 calls | 40 seconds |
| Group 2 | 2 calls | 36 seconds |
| Group 3 | 1 calls | 34 seconds |

**Average Time to Abandon Calls for Selected Groups:**

**Formula:** $\dfrac{(N(1)\ \times\ t(1))\ +\ (N(2)\ \times\ t(2))\ +\ (N(3)\ \times\ t(3))}{N(1)\ +\ N(2)\ +\ N(3)}$

**Calculation:** $\dfrac{(5\ \times\ 40)\ +\ (2\ \times\ 36)\ +\ (1\ \times\ 34)}{(5\ +\ 2\ +\ 1)}$

**Avg. Time to Abandon = 38.25 Seconds**

**The Wallboard will display - 0:38**

# Infocus Status Display Configuration

If you have installed Infocus Status Display for Windows 95/98/NT/2000 (COM or LAN) Add-On, you will need to configure Infocus Status Display for the following parameters:

◗ Baud Rate (for use with COM Port installation only)

◗ COM Port (for use with COM Port installation only)

◗ Dynamic Data Rate (for use with COM Port or LAN installation only)

◗ Config Data Rate (for use with COM Port or LAN installation only)

◗ Name/IP Address (for use with LAN installation only)

   *Note:  This Address should not be changed.*

◗ TCP/IP Port Number (for use with LAN installation only)

   *Note:  This Port Number should only be changed when another application is using the same Port Number.*

Follow these steps to configure Infocus Status Display:

**1** On the **Configuration Menu** highlight **Status Display** and press **ENTER** to display the Infocus Status Display Configuration screen.

```
01/02/00  11:21:00 am          CINPHONY (123456)            7% Disk Full

  Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

            Agent
            Group
            Line
            Supervisor
        ┌─────────Infocus Status Display Configuration─────────┐
        │                                                       │
        │  Baud Rate              19200            Save         │
        │  COM Port               COM 1                         │
        │  Dynamic Data Rate      2                Exit         │
        │  Config Data Rate       1                             │
        │  Name/IP Address                                      │
        │  TCP/IP Port Number                                   │
        │                                                       │
        └───────────────────────────────────────────────────────┘
            Printer
            Wallboard
            Infocus Status Display


To edit, type in up to 5 numeric characters and press ENTER/CLICK
```

**Baud Rate** (for use with COM Port installation only)

**1** Highlight **Baud Rate** and press **F2 Key** to display list of Baud Rates.  Highlight the **Baud Rate** and press **ENTER** to select.  The default Rate is 19200; however, you can select a higher Rate depending upon your office environment (e.g., cable length, cable quality, electrical interference, etc.).  Test the quality of each Rate until you find the highest to which data can be sent to the Remote PC without problem.  There are 9 Baud Rates:

• 1200

• 2400

• 4800

• 9600

• 14400

• 19200

- 28800
- 38400
- 57600

**COM Port** (for use with COM Port installation only)

**2** Highlight **COM Port** and press **F2 Key** to display list of COM Ports.  Highlight the **COM Port** press **ENTER** to select.  The data cable sending status data from the Applications Module to the Remote PC is connected to this COM Port.  Make sure the COM Port selected is available.  There are 4 COM Ports from which to choose:

- COM1 (default)
- COM2
- COM3
- COM4

**Dynamic Data Rate** (for use with COM Port or LAN NIC installation only)

**3** Type in **2 to 99 seconds** for remote update interval that is the rate to send Dynamic Data from the Applications Module to the Infocus Server PC.  Dynamic Data is all of the System, Group, and Agent Statistics found on the Agent and Group Status screens.

**Config Data Rate** (for use with COM Port or LAN NIC installation only)

**4** Type in **1 to 16 minutes** for remote update interval that is the rate to send Config Data from the Applications Module to the Infocus Server PC.  Config Data is Agent Configuration information: Agent ID, Agent Name, and Group(s) to which the Agent is assigned.

**Name/IP Address** (for use with LAN NIC installation only)

**5** If you need to change this address, type in the new **Name/IP Address**.

**TCP/IP Port Number** (for use LAN NIC installation only)

**6** If you need to change this address, type in the **Port Number**.

**7** When completed press **F10** or select **Save** and press **ENTER** to save this Configuration.

If you are an authorized Technician, refer to the Infocus Installation and User Guide for directions to install the Infocus Status Display hardware and software.

```
01/02/00  11:21:00 am        CINPHONY (123456)           7% Disk Full

  Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell

                  Agent
                  Group
                  Line
                  Supervisor
              Infocus Status Display Configuration

          Baud Rate                              Save
          COM Port
          Dynamic Data Rate      2               Exit
          Config Data Rate       1
          Name/IP Address        250.50.3.110
          TCP/IP Port Number     5500




                  Printer
                  Wallboard
                  Infocus Status Display




To edit, type in up to 5 numeric characters and press ENTER/CLICK
```

# Chapter 3: Using Norstar Sets

# Introduction

Listed below are the models of Station Sets used by either a Supervisor and/or Agent:

◗ **T7100** – Business Terminal and **M7100** – Meridian (Agent Sets)

◗ **T7208** – Business Terminal and **M7208** – Meridian  (Agent Sets)

◗ **T7316** – Business Terminal and **M7310** – Meridian (Agent and Supervisor Sets)

◗ **M7410** – Meridian Cordless (Agent and Supervisor)

◗ **M7324 –** Meridian  (Agent and Supervisor)

◗ **C3050** – Companion Portable (Agent and Supervisor)

◗ **C3060** – Companion Portable (Agent and Supervisor)

> ***Note:*** *Analog 2500-Compatible Station Sets can also be used; however, functions are limited to Login, Logout, Available, and Unavailable.*

**T7316, M7310, and M7410 (Cordless) features:**

◗ 2 Line LCD (Liquid Crystal Display) screen.

◗ 12/24 programmable dual-memory keys.

◗ 10 programmable memory keys with indicator lights.

◗ 3 Softkeys.

**M7324 features:**

◗ 2 Line LCD (Liquid Crystal Display) screen.

◗ 24 programmable memory keys with indicator lights.

◗ 3 Softkeys.

> ***Notes:*** *The T7316, M7310, and the M7324 have a 2 line display screen.  The first line displays CINPHONY messages and, to the right of some messages, an area to input information.  The second line displays directions for the Softkeys.*

> *The Softkey directions are uppercase and provide directions such as: BKSP (backspace to delete characters from right to left), OK (confirm message), EXIT (cancels and/or displays previous message).*

**T7208 and M7208 features:**

◗ 3 Softkeys (T7208 only)

◗ Single Line LCD screen.

◗ 8 programmable memory keys with Indicator lights.

> ***Notes:*** *This Station Set does not have Softkeys.  The \* on the keypad serves as BKSP (Backspace), the # on the keypad serves as OK, and the Rls (release) Key serves as EXIT.*

> *Supervisors cannot use the M7208, because a 2 Line LCD is needed for Supervisor features.*

**C3050 and C3060 features:**

◗ 2 Line LCD (Liquid Crystal Display) screen.

◗ 3 Softkeys.

◗ Can only be used with MICS 4.1 (Working Issue 6.13) or greater.

**T7100 and M7100 features:**

◗ Single Line LCD (Liquid Crystal Display) screen.

# Feature Codes (Main Menu)

Feature Codes are 3 numeric characters ranging from 900 to 999. Each Feature Code performs a specific function when executed by the Supervisor or Agent. ACD provides a list of these Feature Codes for your reference.

*Note: If configuration changes are being activated in ACD, Station Sets will display a System Busy message if an Agent or Supervisor tries to execute a feature session.*

Follow these steps to display the Feature Code Assignments for Supervisor and Agent Functions:

**Main Menu**

**1** On the Main menu, move cursor to highlight **Status** to display the choices. Highlight **Feature Codes** and press **ENTER/CLICK** to display the Feature Codes Assignments screen.

```
01/08/99   9:15:27 am        CINPHONY (112233)        19% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                            Feature Codes Display

   ┌─────────────────┬──────────────┐   ┌─────────────────────────┬──────────────┐
   │ Agent Functions │ Feature Code │   │ Supervisor  Functions   │ Feature Code │
   ├─────────────────┼──────────────┤   ├─────────────────────────┼──────────────┤
   │ LOGIN           │     903      │   │ REGISTER                │     909      │
   │ UNAVAILABLE     │     904      │   │ RETRIEVE MESSAGES       │     910      │
   │ CANCEL WRAP     │     905      │   │ ANNOUNCEMENT MAINTENANCE│     911      │
   │ HELP            │     906      │   │ MONITOR CALL            │     912      │
   │ CATEGORIZE      │     907      │   │ PLAY CALL               │     913      │
   │ RECORD CALL     │     908      │   │ EMERGENCY ROUTING       │     914      │
   │ CALLS QUEUED    │     918      │   │ GROUP STATUS            │     923      │
   └─────────────────┴──────────────┘   └─────────────────────────┴──────────────┘

      Exit



   Press ENTER/CLICK to return to Status Menu
```

**2** Press **ESC** to exit this screen.

There are 7 Agent Functions and 6 Supervisor Functions that can be performed on the Station Sets (depending on the ACD Level). Group Status, listed under Supervisor Functions, can be used by Agents or Supervisors. Announcement Maintenance, listed under Supervisor Functions, becomes an Agent Function if you are using PRELUDE ACD.

To use a Feature Code:

- Press the **Feature button** on your Station Set.

- Type in the **Feature's 3 digit code** to perform the function.

You can program Feature Codes into the Memory Keys for the T7316, M7310, M7324, M7410, T7208, and M7208 Station Sets. You then need only to press the assigned Memory Key to perform the Feature.

Refer to the Norstar Station Set documentation for directions on programming memory keys.

In PRELUDE, Supervisor Functions are not available; therefore, only the Agent Functions will display on the screen.

# Agent Functions

You can perform the following Agent Functions:

❱ **Login**

The system is notified that an Agent is ready to receive ACD Calls.

❱ **Unavailable**

The Agent is still logged in but is not receiving ACD Calls at this time.

❱ **Cancel Wrap**

Enables the Agent to eliminate the specified length of time needed to wrap up the last call and become available to receive an ACD Call.

❱ **Help**

This Function is only available for CINPHONY I & II Levels.

Agent requests help from the Supervisor.

❱ **Calls Queued**

Agent can display the number of calls in queue and the duration of the longest call in queue for each Group into which the Agent has logged.

❱ **Categorize**

At the end of a call, Agent enters a tracking code or category for each ACD Call.  If Force Categorization is set to YES, then the Agent will be prompted to enter code after the call; if NO, then Agent must remember to enter the code after the call.

❱ **Record Call**

When a call is answered it can be recorded using this feature; however, the recording is terminated if any key on the Station Set is pressed.

❱ **Announcement Maintenance**

Announcement Maintenance is an agent Function when you are using PRELUDE ACD.  For CINPHONY Levels I and II, it is a Supervisor Function.

There is a recommended layout for these Functions for each Station Set.

*Notes: Login, Unavailable, and Record Call should be positioned along the Indicator LCD.  The remaining functions can be positioned on the memory or dual memory keys.*

*For ACD purposes, an Agent Station Set needs to be assigned at least 2 Intercom buttons. Refer to Norstar manual.*

The M7208, T7100, and M7100 do not have Softkeys below the Single Line LCD.  The following keypad keys replace the Softkeys (**#**, **\***, and **Rls**).

# Performing Agent Functions

*Note: All Functions performed in these sections will use the T7316 Station Set as the example.*

## Login

*Note: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Login. It is recommended that you program the Login Feature Code to a memory key and label that key with the Login key cap. Once programmed, the indicator light will display on the LCD beside the Login Key.*

Follow these steps to Login an Agent:

**1** Press the **Login Key**, or press the **Feature Key** and type in **Login Feature Code** (3 digits). The next message to display:

```
Login: ----


BKSP    OK     EXIT
```
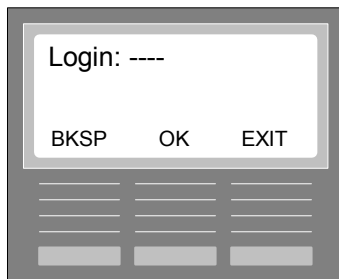
**2** Type in **Agent ID Number** (up to 4 digits).

*Note: BKSP (or *)  deletes characters right to left; EXIT (or Rls) aborts.*

**3** Press the **OK** softkey **(**or **#)** to confirm and the Agent is ready to receive calls when the **Logged in** message displays. If Supervisor is receiving Information Messages (YES), a tone sounds on the Supervisor's Station Set.

However, if the Agent's Login is Password protected, the next message to display:

```
Pwd: ---------


BKSP    OK     EXIT
```
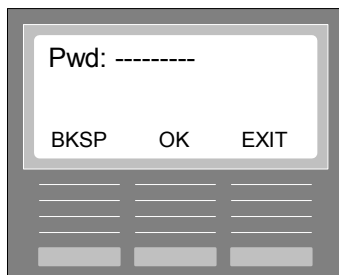
**4** Type in **Password** (up to 8 digits, digits do not display), and press the **OK** softkey **(**or **#)** to confirm (BKSP = * and EXIT = Rls). The Agent is ready to receive calls when the **Logged in** message displays. However, if the Agent is assigned to 2 or more Groups, the next message to display:

```
Assigned Groups


EDIT    OK     EXIT
```

**5** If you do not want to edit any Groups, press the **OK** softkey **(**or **#)**. The Agent is ready to receive calls when the **Logged in** message displays (EXIT = Rls).

**6** However, if you want to change (edit) the Groups to which the Agent is assigned, press the **EDIT** softkey **(**or **\*)**. The next message to display:

```
Grp: 77 78 79 80


BKSP      OK      EXIT
```

*Note: In CINPHONY II you can assign an Agent to 80 Groups; therefore, in this example, Groups 77, 78, 79, and 80 will display.*

**7** If you want to delete a Group, press the **BKSP** softkey **(**or **\*)** to delete from highest to lowest until you have deleted the specific Group. To add the Groups back you did not want to delete, type in the Group Numbers (2 digits, in any order) (EXIT = Rls).

*Note: Edits are only effective for the period you are logged in. If you log out and log back in, all Groups will display in their original lowest to highest order.*

**8** When you have completed viewing or editing, press the **OK** softkey **(**or **#)** to confirm. The **Logged in** message will display for a few moments and then the Date and Time message will display.

When calls are queued for this Agent (for any of the Groups), the Login Indicator arrow flashes at rates determined by the Indicator FlashRate set under System Wide Parameters, Configuration Menu.

```
Logged in
```
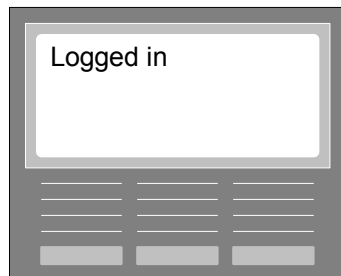
**Login Errors:**

```
Invalid agent ID
```

◗ Invalid Agent ID Number.

```
┌─────────────────────┐
│  Login denied       │
│                     │
│                     │
└─────────────────────┘
```
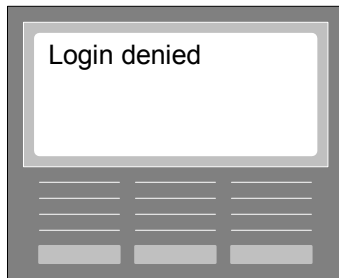
◗ ID already logged in.
◗ This set is an Alert set.

```
┌─────────────────────┐
│  Unregister first   │
│                     │
│                     │
└─────────────────────┘
```

◗ This set is registered as a Supervisor

```
┌─────────────────────┐
│  Log in first       │
│                     │
│                     │
└─────────────────────┘
```

◗ Agent tried to perform a function without logging in.

```
┌─────────────────────┐
│  Invalid password   │
│                     │
│                     │
└─────────────────────┘
```

◗ Incorrect Password.

```
Login aborted
```
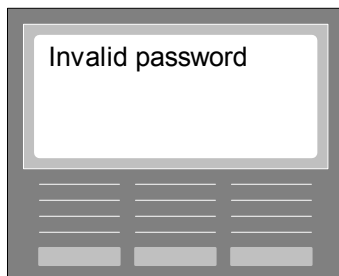
◗ Agent stopped login or was timed out (15 seconds).

```
Logins exceeded
```
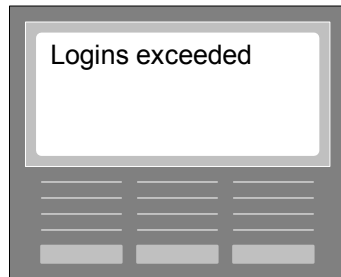
◗ Agent tries to login when system has reached capacity for Agent logins.

# Receiving Calls

When a call is sent to the Agent's Station Set, the abbreviated Group Name displays (up to 8 digits) and the length of time the call has been in the queue.

```
xxxxxxxx        99:99
```

***System Wide Parameters / Display on Station Set Note:***

*On the System Wide Parameters screen, you can select whether you want the Group, DNIS Description, CDR Number, or CDR Description to display on the Agents' Station Set when ACD Calls reach the Station Sets. There are 4 types of configurations possible to help you make your selection:*

- ● ***Group is default***. *When an ACD call has not been routed by Destination Number Configuration (DNIS) or Caller Directed Routing Number Configuration (CDR), the Group to where the call was routed will display on the Station Set.*

- ● ***Select Group or DNIS Description***. *When an ACD call is routed by Destination Number Configuration (DNIS) to a Group.*

- ● ***Select Group, DNIS Description, CDR Number or CDR Description***. *When an ACD call is routed by Destination Number Configuration (DNIS) to the CDR Table.*

- ● ***Select Group, CDR Number, or CDR Description***. *When an ACD call is routed by Caller Directed Routing Number Configuration (CDR) to the CDR Table.*

**To accept the call:**

◗ Handset - pick up receiver.

◗ Headset - press flashing Intercom Key, unless answer forcing is set.  In this case, you will receive a zip tone and then the call.

*Note: If Full Handsfree is set to YES, press the Handsfree Mute Key. You can also pick up the receiver.*

## Overflow Call

If an overflow call is being sent to you from another Group, the abbreviated name of the Group from which the call originated displays with a + symbol followed by the length of time the call has been in the queue.

```
xxxxxxxx      99:99
```

## Log Out

Follow the same steps used for Log In and follow the display messages.

**1** Press the **Login Key**, or press the **Feature Key** and type in the **Login Feature Code**.

The next message to display:

```
Logout ?


BKSP    OK    EXIT
```
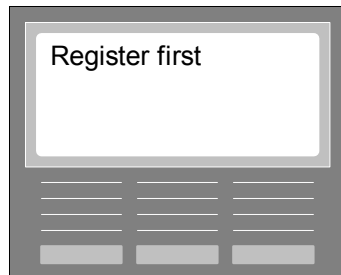
**2** Press the **OK** softkey **(**or **#)** to Logout (BKSP = * and EXIT = Rls).  A Logout message will display for a few moments before the Date and Time message displays.

**Error Messages:**

```
Logout aborted
```

◗ Agent stopped logout by pressing the EXIT key or the Rls button, or was timed out (15 seconds).

```
End call first
```

◗ Agent tried to logout when on a call.

## Unavailable

*Note: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Unavailable. It is recommended that you program the Unavailable Feature Code to a memory key and label that key with the Unavailable key cap. Once programmed, the indicator light will display on the LCD beside the Unavailable Key.*

Follow this step to make an Agent Unavailable to receive calls:

**1** Press the **Unavailable Key**, or press the **Feature Key** and type in the **Unavailable Feature Code** (3 digits). The next message to display for 5 seconds:

> Unavailable

The next message to display is Date and Time. The Indicator arrow for Unavailable Key displays if it was programmed.

*Note: An Agent cannot go Unavailable if a Station Set is ringing.*

Repeat the same step to become **Available**. An Available message will display for a few moments before the Date and Time message displays. The Indicator arrow for the Unavailable Key is extinguished if it was programmed.

*Note: If you try to go Unavailable during a call, you will not be allowed; however, the command will be remembered. After the call, you will go Unavailable. If Wrap Duration is set, you will become unavailable after wrap ends.*

**Error Message:**

> Log in first

◗ Agent tried to perform a function without logging in.

## Cancel Wrap

*Note: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Cancel Wrap.*

Follow this step to Cancel Wrap Duration and free Station Set for next call:

**1** Press the **Cancel Wrap Key**, or press the **Feature Key** and type in the **Cancel Wrap Feature Code**.

The Date and Time message reappears. The Agent is ready to receive the next call.

**Error Messages:**
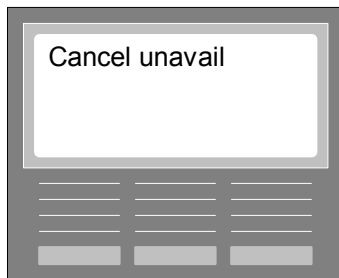


Cancel unavail

◗ Agent is in wrap and unavailable but tries to cancel wrap before going available.



Log in first

◗ Agent tried to perform a function without logging in.

## Help

*Note: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Help.  Help is only available for CINPHONY I & II Levels.*

Follow this step to request Help from the Supervisor during an ACD Call:



Line 005

TRANSFER
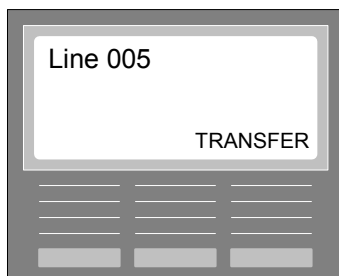
**1** Press the **Help Key**, or press the **Feature Key** and type in the **Help Feature Code**.  The next message to display for a few moments:

```
Help sent
```

The Help sent Message displays on the Agent's Station Set. On the Supervisor's Station Set, a message displays the first initial of the Agent followed by the last name.  For example:

```
J. Smith        Help
```
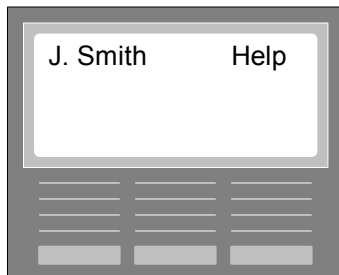
*Note: If you request Help when not on a call, a message will display, **Dial Supervisor**.  Dial the Supervisor's extension.*

**Error Message:**

```
No Supervisor
```

◗ Agent tries to request Help from Supervisor, but Supervisor is not registered.

```
Dial Supervisor
```

◗ Agent is idle or on Non-ACD Call and tries to request Help from supervisor.

> Agent tried to perform a function without logging in.

## Calls Queued

*Note: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Call Queued.  An Agent can use this feature while on or off a call to see how many calls are in queue and which call has the longest duration in queue.  Only the Groups in which the Agent has logged in can be viewed by Agent.*

Follow these steps to view the Calls Queued:

1   Program a memory button for the **Calls Queued Feature.**

2   If you are on a call and you press the **Calls Queued key**, you will receive the status for calls in your current Group.  Each time you press the Call Queued button, you will receive the status for the next Group into which you are logged.

For example, you are logged in to Group 1, 2, 3, and 4. You are on a call for Group 2, there are 4 calls in queue, and one of the calls has been in queue the longest for 2 minutes and 15 seconds.  If you press the Call Queued button, the LCD screen will display the following screen:
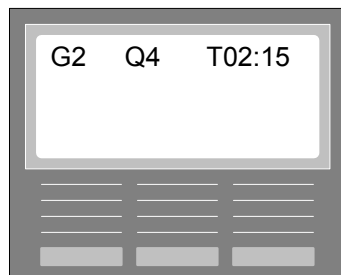


If you press the Calls Queued button again, Group 3 status will display.  You can view all 4 Groups by pressing the Calls Queued button.

If you are not on a call and you press the Calls Queued button, you will start at your first Group.  In the example above, Group 1 status would display first; and, each time you pressed the button, the next Group status would display.

G# = Group Number

Q# = Number of calls in queue

TMM:SS = time of longest call in queue

**Error Message:**



❱Agent tried to perform a function without logging in.

## Categorize

*Note:  Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Call Categorization.*

Follow these steps to enter a **Category Code** after the call has been completed:

1   If Prompted Categorization has been set to YES, you will be prompted by the following message after releasing the call:



If Prompted Categorization has been set to NO, press the **Categorize Key**, or press the **Feature Key** and type in the **Categorize Feature Code** (3 digits).  The same message as above will display.

2   Type in the **Category Code(s)** (up to 12 digits for each code) and press the **OK** softkey **(**or **#)** (BKSP = * and EXIT = Rls).

*Note: 15 seconds is allotted to type in 1 or more codes, or until Wrap Duration (automatic) expires (whichever is shorter).  If Wrap Duration has been set to NONE, you cannot enter a Categorization Code.*

# Record Call

*Note: Record Call is only available for CINPHONY I & II Levels. Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Record Call.*

Follow this step to **Record a Call**:

**1** Press the **Record Call Key**, or press the **Feature Key** and then type in the **Record Call Feature Code**. The next message to display:

```
Record request
```

The next message to display is the Recording ID Number assigned automatically by ACD:

```
Recording: xxxxx
```
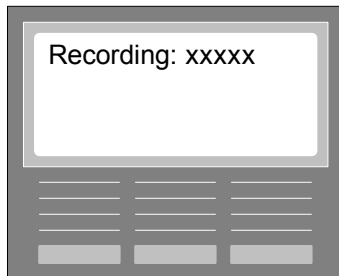
To stop Recording: hang-up, press Rls, Hold, or Feature Keys. The next screen to display:

```
Record Off
```

*Restrictions:*

- *Agent must be logged-in.*
- *Cannot Record a conference call.*
- *Cannot Monitor a Recording.*

**Error Messages:**

```
No active call
```

◗ Agent is not on a call, or Agent is on conference call.

```
Log in first
```

◗ The Agent is not logged in. Log in first.

```
Record Off
```

◗ No Voice Port available to record a call - configure voice port, or another Agent is recording.

# Supervisor Functions

Supervisor Functions are only available for CINPHONY I & II Levels.

The following 6 Supervisor Functions you can perform using either the T7316, M7310, M7324, M7410, C3050, or C3060 Station Sets.  The Group Status Function can be used by either an Agent or a Supervisor:

◗ **Register**

The system is notified that a Supervisor is registering to perform other functions.

◗ **Retrieve Message**

The Supervisor can view Informational and/or Warning messages.

◗ **Announcement Maintenance**

Supervisor can record an announcement or play back an announcement.

◗ **Monitor Call (Silent Monitor)**

The Supervisor can listen in on an Agent's call and/or join in on the call.  This Function cannot be performed by the M7410 Cordless Set.

◗ **Play Call**

Supervisor can play back calls recorded by Agents.

◗ **Emergency Routing**

Anyone can enable the Emergency Group so that all incoming calls will be sent to that Group.  An Agent does not have to be logged in nor does a Supervisor have to be registered to use this function.

*Note: Monitor Call (Silent Monitor) and Retrieve Message should be positioned along the Indicator LCD.  The remaining functions can be positioned on the memory or dual memory keys.*

◗ **Group Status**

Anyone can view the status of a Group.  An Agent does not have to be logged in nor does a Supervisor have to be registered to use this function.  After specifying a Group, the status screen displays the Group number, the number of calls currently in queue, and the longest time a call is currently in queue.

# Performing Supervisor Functions

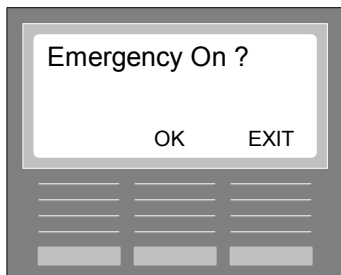*Note: All Functions performed in these sections will use the T7316 Station Set as the example.*

## Register

*Note: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Register. It is recommended that you program the Register Feature Code to a memory key and label that key with the Register key cap. Once programmed, the indicator light will display on the LCD beside the Register Key.*

Follow these steps to Register a Supervisor:

**1** Press the **Register Key**, or press the **Feature Key** and type in **Register Feature Code** (3 digits). The next message to display:

```
Register: xxxx


BKSP    OK    EXIT
```

**2** Type in **Supervisor ID Number** (up to 4 digits) and press the **OK** softkey. The Supervisor is registered. However, if the Supervisor ID is Password protected, the next message will display:

```
Pwd:  xxxx


BKSP    OK    EXIT
```

**3** Type in **Password** (up to 8 digits, digits do not display) and press the **OK** softkey. The next screen to display:

```
Warning Msg ?


YES    NO    EXIT
```
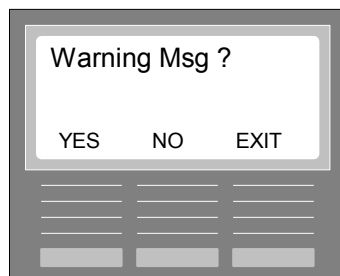
**4** Press the YES softkey if you want to receive warning messages after registering. Press the NO softkey to not receive these messages. Or press the EXIT softkey to abort registering.

If you pressed the YES or NO softkey, the next message to display:

```
Information Msg ?


YES     NO      EXIT
```
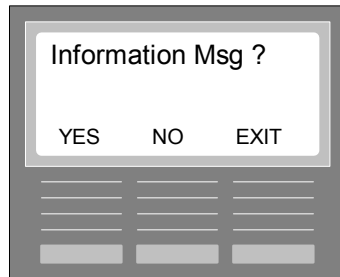
**5** Press the YES softkey if you want to receive information messages.  Press the NO softkey to not receive these messages.  Or press the EXIT softkey to abort registering.

*Note: Warning message examples: Overflow occurring, day and night routing change over, no Agents logged into Group.  Information message examples: Agent has logged in, Agent has logged out. Supervisors will always receive critical messages (e.g., Help) when they occur.  See Appendices Chapter for Supervisor Information and Warning Messages.*

If you pressed the YES or NO softkeys, the next message to display:

```
Registered
```

The Supervisor is Registered.

To Unregister the Supervisor follow these steps:

**1** Press the **Register Key**, or press the **Feature Key** and type in the **Register Feature Code**.

The next message to display:

```
Unregister ?

BKSP     OK      EXIT
```

**2** Press the **OK** softkey to Unregister.  An Unregistered message will display for a few moments before the Date and Time message displays.

**Error Messages:**

Invalid Spvr ID
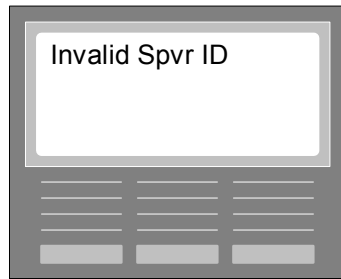
◗ Incorrect Supervisor ID Number.

Register first

◗ Supervisor must register before trying to perform a function.

Register denied
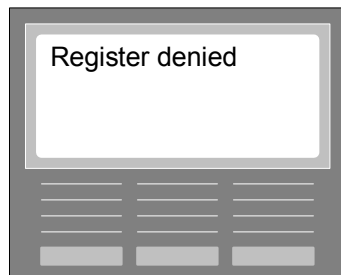
◗ Supervisor ID has already been registered.

Invalid password

◗ An incorrect Password was entered.

Register aborted

◗ Supervisor stopped registering and canceled, or was timed out (15 seconds).

◗ Supervisor stopped unregistering and canceled, or was timed out (15 seconds).

Unregister first

◗ Agent tried to login on Supervisor Station Set.

## Retrieve Message

*Note: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Retrieve Message. It is recommended that you program the Retrieve Message Feature Code to a memory key and label that key with the Retrieve Message key cap. Once programmed, the indicator light will display on the LCD beside the Retrieve Message Key.*

Follow these steps to Retrieve a Message:

*Note: The Indicator arrow for Messages flashes when a message is waiting.*

**1** Press the **Retrieve Message Key**, or press the **Feature Key** and type in the **Retrieve Message Feature Code**. The first message will display.

**2** Repeat this step until all messages are retrieved and the following message displays for a moment:

No Messages

The Date and Time message will display.

**Error Message:**

Register first

```
BKSP    OK    EXIT
```

◗ Supervisor must register before trying to perform a function.

## Announcement Maintenance

*Notes: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Announcement Maintenance.*

*Announcement Maintenance is also an Agent Function if you are using PRELUDE ACD.*

Follow these steps to Record an Announcement:

**1** Press the **ANNC MAINT Key**, or press the **Feature Key** and type in the **Announcement Maintenance Feature Code**. The next message to display:

```
Announcement:

BKSP    OK    EXIT
```

**2** Type in up to 2 digits and press the **OK** softkey. The next message to display:

*Note: You can record up to 240 announcements. A recorded announcement must not exceed 15 minutes.*

```
Announcement:  xx

RECORD  PLAY    EXIT
```

**3** As soon as you see this screen, pick up the handset and then press the **RECORD** softkey. The next message to display:

```
Recording . . .

        STOP    EXIT
```

**4** When you hear the beep, speak into the handset to record Announcement. When completed, press the **STOP** softkey. The next screen to display:

```
Announcement: xx


RECORD  PLAY    EXIT
```

Press RECORD again if you want to re-record announcement. Press PLAY if you want to play the announcement. Press EXIT to return to the Date and Time message.

Follow these steps to play back an Announcement recorded earlier:

**1** Press the **ANNC MAINT Key**, or press the **Feature Key** and type in the **Announcement Maintenance Feature Code**. The next message to display:

```
Announcement: 00


BKSP    OK      EXIT
```

**2** Type in the **Announcement Number** you want to play, and press the **OK** softkey.

The next message to display:

```
Announcement: xx


RECORD  PLAY    EXIT
```

**3** Press the **PLAY** softkey, and the next message to display:

```
Playing . . .


        STOP    EXIT
```

**4** Press the STOP softkey if you want to discontinue playing the Announcement, or press the EXIT softkey to quit.

The Date and Time message will display.

**Error Message:**



> Register first

◗ Supervisor must register before trying to perform a function.

## *Recording Average QTime Announcements or Expected QTime Announcements*

If you have selected User-Recorded Announcement Set for the Average QTime Announcement and/or the Expected QTime Announcement Routing Commands, you will use Announcement Maintenance to record the set of announcements.

Follow the same content for each announcement as provided below. ACD will calculate and match to these numbers in the minute numbering plan. You can alter the way in which you record Announcements 241 and 242

**User-Recorded Announcements for Average QTime and Expected QTime:**

**241: "The average time to answer a call today is approximately…"**

**242: "The expected wait time for your call is approximately…"**

**243: "… one minute."**

**244: "… two minutes."**

**245: "… three minutes."**

**246: "… four minutes."**

**247: "… five minutes."**

**248: "… six minutes."**

**249: "… seven minutes."**

**250: "… eight minutes."**

**251: "… nine minutes."**

**252: "… ten minutes."**

**253: "… ten minutes or longer."**

**Pre-Recorded Announcements for Average QTime and Expected QTime:**

**267: "The average time to answer a call today is approximately…"**

**268: "The expected wait time for your call is approximately…"**

**269: "… one minute."**

**270: "… two minutes."**

**271: "… three minutes."**

**272: "… four minutes."**

**273: "… five minutes."**

**274: "… six minutes."**

**275: "… seven minutes."**

**276: "… eight minutes."**

**277: "… nine minutes."**

**278: "… ten minutes."**

**279: "… ten minutes or longer."**

## Monitor Call

*Notes: A Supervisor can monitor an Agent's call via the Headset, the Handset connected to Headset jack, or the Station Set speaker. Your system can also be modified to disable Monitor Call (contact your Technician or CINTECH to make this change). The Supervisor's Station Set must be equipped with a Hands-free Mute button. When the Handset is used, use the **Rls Key** to terminate monitoring rather than the EXIT softkey.*

*This Function cannot be performed by the M7410 Cordless Set.*

*Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Monitor Call.*

Follow these steps to Monitor an Agent's call:

**1** Press the **Monitor Call Key**, or press the **Feature Key** and type in the **Monitor Call Feature Code**. The next message to display:

```
Monitor:


BKSP    OK      EXIT
```

**2** Type in **Agent's ID Number** (up to 4 digits) and press the **OK** softkey. The next message to display:

```
Monitoring:   xxxx


       JOIN     EXIT
```

**3** The Supervisor can either listen to the call or press the **JOIN** softkey to converse with Agent and caller.

If you press the **JOIN** softkey, the next message to display:

```
Monitoring:   xxxx


       LEAVE    EXIT
```

**4** To return to Monitoring, press the **LEAVE** softkey. To stop monitoring, press the EXIT, Rls, HOLD, or Feature Key.

The Date and Time message will display.

**Error Messages:**

```
No active call
```

◗ Agent is not on a call.

```
Not authorized
```

◗ Cannot monitor this Agent.

```
Register first
```

◗ Supervisor must register before monitoring a call.

```
Monitor stopped
```

◗ Agent has disconnected call while being monitored.

```
Monitor denied
```
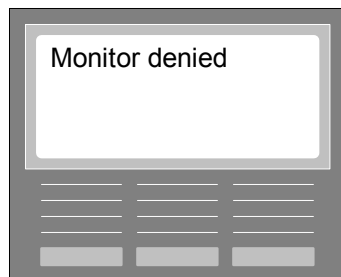
◗ Agent is already being monitored, or is recording a call.

```
Not logged in
```

◗ Supervisor enters wrong Agent ID, or ID not logged in, and tries to silent monitor call.

```
Not supported
```

◗ Norstar does not support Silent Monitoring.

## Play Call

*Notes: Calls that are recorded are assigned a number by ACD. These numbers are displayed on the Recorded Calls Maintenance screen under the System Maintenance Menu.*

*Select Feature Codes on the Main Menu to view the Feature Code that Norstar assigned to Play Call.*

Follow these steps to play back an Agent's Recorded Call:

1  Press the **Play Call Key**, or press the **Feature Key** and type in the **Play Call Feature Code**. The next message to display:

```
Agent: xxxx

BKSP    OK      EXIT
```

2  Type in the **Agent ID Number** (up to 4 digits) and press the **OK** softkey. The next message to display:

```
Call: xxxx

BKSP    OK      EXIT
```
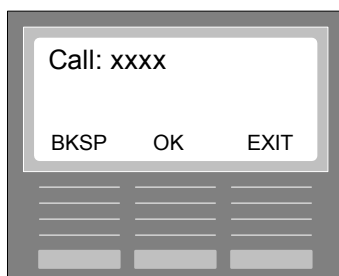
3  Type in the **Recorded Call Number** and press the **OK** softkey. The next message to display:

```
Playing . . .

                    EXIT
```

**4** Listen to recording. Press the **EXIT** softkey if you want to stop.  A Terminate message will display for a few moments before the Date and Time message displays.

**Error Messages:**

```
Not available
```

◗ No Voice Ports are available to play call back at this time - try again.

```
Not Recorded
```

◗ Recorded Call Number does not exist.  Go to System Maintenance Menu and view calls on Recorded Calls Maintenance screen.

```
Register first
```

■ Not a registered Supervisor.

```
┌─────────────────────────┐
│  ┌───────────────────┐  │
│  │ Call not found    │  │
│  │                   │  │
│  │                   │  │
│  └───────────────────┘  │
│  ═══════ ═══════ ═══════ │
│  ═══════ ═══════ ═══════ │
│  ▭▭▭▭  ▭▭▭▭  ▭▭▭▭        │
└─────────────────────────┘
```

◗ No call recorded under Call ID.

```
┌─────────────────────────┐
│  ┌───────────────────┐  │
│  │ Terminated        │  │
│  │                   │  │
│  │                   │  │
│  └───────────────────┘  │
│  ═══════ ═══════ ═══════ │
│  ═══════ ═══════ ═══════ │
│  ▭▭▭▭  ▭▭▭▭  ▭▭▭▭        │
└─────────────────────────┘
```

◗Play call has been canceled.

# Emergency Routing

*Notes: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Emergency Routing.*

*Emergency Group must have been previously configured.*

*An Agent does not have to be logged in nor does a Supervisor have to be registered to use this function.*

Follow these steps to turn Emergency Routing ON so all calls will be routed to the Emergency Group:

**1** Press the **Emergency Routing Key**, or press the **Feature Key** and type in the **Emergency Routing Feature Code**.  If Password protected, the next message to display:
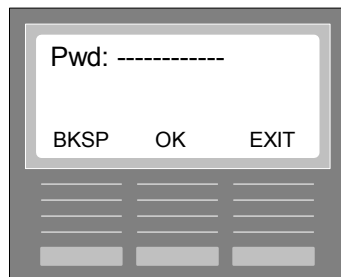
```
┌─────────────────────────┐
│  ┌───────────────────┐  │
│  │ Pwd: ------------  │  │
│  │                   │  │
│  │  BKSP   OK   EXIT │  │
│  └───────────────────┘  │
│  ═══════ ═══════ ═══════ │
│  ═══════ ═══════ ═══════ │
│  ▭▭▭▭  ▭▭▭▭  ▭▭▭▭        │
└─────────────────────────┘
```

**2** Type in **Password** (up to 8 digits, digits are not displayed) and press the **OK** softkey.  The next screen to display:

```
┌─────────────────────────┐
│  ┌───────────────────┐  │
│  │ Emergency On ?    │  │
│  │                   │  │
│  │        OK    EXIT │  │
│  └───────────────────┘  │
│  ═══════ ═══════ ═══════ │
│  ═══════ ═══════ ═══════ │
│  ▭▭▭▭  ▭▭▭▭  ▭▭▭▭        │
└─────────────────────────┘
```

**3** Press the **OK** softkey to turn Emergency Routing ON.  The next message to display for a few moments:

```
Emergency On
```

The Date and Time message displays. All calls will be routed to the Emergency Group.

Follow these steps to turn Emergency Routing OFF so all calls will be routed to original Groups:

**1** Press the **Emergency Routing Key**, or press the **Feature Key** and type in the **Emergency Routing Feature Code**.  The next message to display:
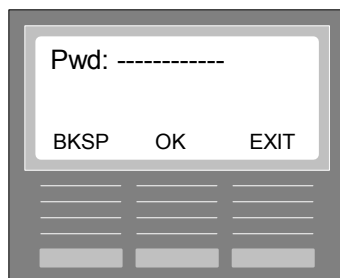
```
Pwd: ------------

BKSP    OK      EXIT
```

**2** Type in **Password** (up to 8 digits, digits are not displayed) and press the **OK** softkey.  The next screen to display:

```
Emergency Off ?

         OK      EXIT
```
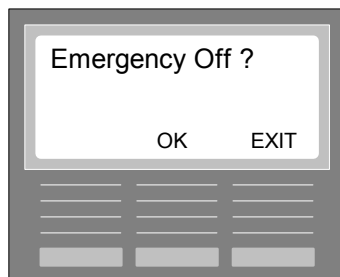
**3** Press the **OK Key** to turn Emergency Routing OFF.  The next message to display for a few moments:

```
Emergency Off
```
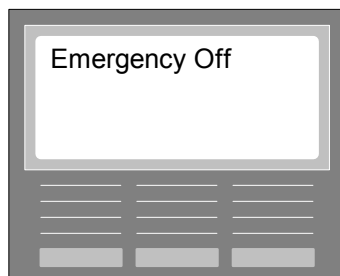
The Date and Time message displays. All calls will be routed to their original Groups.

*Note: Emergency Routing can be turned ON or OFF at a Supervisor's or Agent's Station Set.  While Emergency Routing is in affect, a red and white diamond flashes in the upper right corner of the ACD screens.*

**Error Message:**

```
Not Configured
```
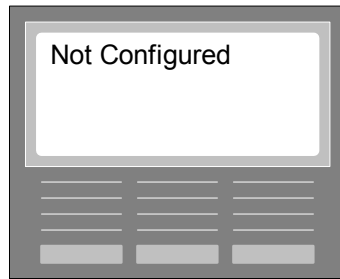
◗ Emergency Routing Group has not been configured or has been disabled.

## Group Status

*Notes: Select Feature Codes on the Status Menu to view the Feature Code that Norstar assigned to Group Status.*

*An Agent does not have to be logged in nor does a Supervisor have to be registered to use this function.*

*This function can only be performed on Station Sets T7316, M7208, M7310, M7324, M7410, C3050, and C3060.*

Follow these steps to view the status of a specific Group:

**1** Press the **Group Status Key**, or press the **Feature Key** and type in the **Group Status Feature Code**. The next screen to display:

```
Enter Grp #


        BKSP    OK
```

**2** Type in the **Group Number** and press the **OK** softkey. The next screen to display:

```
G1    Q4    T02:15
```
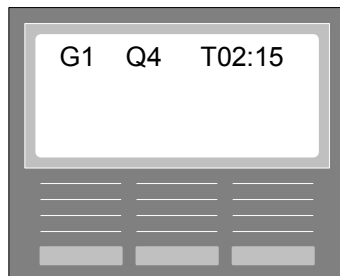
This status screen will display for 5 seconds. It designates the Group you have specified, the number of calls currently in queue for this Group, and the longest time a call is currently in queue.

# Using Analog 2500 Station Sets

You can use these Sets with ACD to perform the following Agent functions:

◗ Login

◗ Logout

◗ Available

◗ Unavailable

*Note: These are the only functions an Agent can perform using the Analog Sets. The Supervisor can only perform a Silent Monitor on an Analog Set.*

To start, the System Administrator must assign a **Login/Logout DN** and an **Available/Unavailable DN**. Refer to this User Guide, Chapter 2 - Configuration, System Wide Parameters to view the DNs.

Once the DNs are specified, they can be programmed to a button on the Analog Station Set. Refer to the Analog Station Set manual.

## Login/Logout

Follow these steps to Login and Logout an Agent using an Analog Station Set:

**Login**

1   Pick up the handset, enter the **Login/Logout DN**, enter your **Agent ID**, and press the **#** key.

2   Enter your **Password** (if any), press the **#** key, and replace the handset. You are logged in and are Available to receive ACD calls.

If the Login is successful, you will hear **2 sets of 2 beeps each rising in pitch**.

If Login fails because a wrong Login/Logout DN was entered, ACD will ignore the request and the Norstar will give you a busy signal. Restart Login.

If Login fails because a wrong Agent ID or Password was entered, you will hear **1 long beep**. Restart Login.

**Logout**

1   Enter the same **Login/Logout DN** and press the **#** key. You will hear **2 sets of 2 beeps each falling in pitch**.

If the wrong Login/Logout DN is entered, you will hear **1 long beep**. Try Logout again.

## Available\Unavailable

Follow these steps to go Unavailable and then Available while you are logged in:

**Unavailable**

1   Enter the **Available/Unavailable DN**.

If the wrong Available/Unavailable DN is entered, ACD will ignore the request and the Norstar will give you a busy signal. Try again to go Unavailable.

**Available**

1   While Unavailable, enter the **Available/Unavailable DN**.

If the wrong Available/Unavailable DN is entered, ACD will ignore the request and the Norstar will give you a busy signal. Try again to go Available.

*Notes: If an Agent's Group is using automatic Wrap, an Agent using an Analog Set will receive the same Wrap duration period. When Wrap Duration has ended, the Agent will be available to receive a call. An Agent can cancel Wrap by going Unavailable and then back to Available during the automatic Wrap period.*

*Refer to your Analog Station Set manual and/or the ATA manual for directions to use the Station Set's features. The features covered in this guide only pertain when using an Analog Station Set with ACD.*

# Chapter 4: Status

There are **4 Status screens** you can view:

◗ **Group Status Display**
◗ **System Status Display**
◗ **Feature Codes**
◗ **About ACD**

# Group Status Display

The Group Status Display screen displays real-time Call Processing Statistics for all of the Agents in a Group.  You will be able to monitor Group performances and identify problems as they occur.

The following information will display to identify each Agent in the Group:

◗ **ID Number**
◗ **Current Activity Status**
◗ **Duration of Current Activity**

## *Call Processing Statistics*

◗ **Calls Queued** - number of calls in queue for this Group.
◗ **Longest Queued** - length of time (MM:SS) the oldest call has been in queue for this Group.
◗ **Calls Overflowed Out** - total number of calls overflowing one Group and answered by another.
◗ **Calls Answered** - total number of calls answered by this Group.
◗ **Average Time To Answer** - average length of time (MM:SS) each Group of Agents answer calls during current routing cycle.
◗ **T.S.F. %** - the Telephone Service Factor is the percentage of calls answered within a Threshold period (in seconds) for the TSF interval (in minutes).  For example, during a 60 minute interval how many calls were answered within a 30 second threshold (from first ring to answer).  This factor is user defined in System Wide Parameters, Configuration Menu.
◗ **Longest Wait** – the longest amount of time a call was in the queue before an action occurred (e.g., answered, abandoned, disconnected, transferred, etc.).   For example, a call spent two minutes and ten seconds in the queue before it was answered.  During that routing period, this was the longest time a call had been in queue before an action occurred with the call.  Another call came into the queue later on during the same routing period and remained in the queue for two minutes and forty seconds.  This call, while currently in queue, became the Longest Queued call.  When this call was finally answered, it then replaced the previous Longest Wait call of two minutes and ten seconds.
◗ **Calls Abandoned** - total number of calls abandoned during current routing cycle.
◗ **Average Time To Abandon** - average length of time (MM:SS) a caller waited in queue before hanging up.  This average is for Group's current routing cycle.
◗ **Calls Disconnected** - the number of times calls were disconnected for this Group by the DISCONNECT Routing Command.
◗ **Calls Transferred** - the number of times calls were transferred out of this Group by the TRANSFER TO, GROUP, LINK XFER, LINE XFER, CDR TABLE, and VMAIL XFER Routing Commands.

## *Agent Status*

The current status of each Agent in the selected Group displays to the right of the Agent's Name.  There are 10 Agent states:

◗ **Logged Out** - Agent is not logged into system.
◗ **Available** - Agent is available to take ACD calls.
◗ **Unavailable** - Agent is logged in but not available to take ACD calls.
◗ **ACD** - Agent is currently on an ACD Call.
◗ **ACD (Group xx)** - Agent is currently on an ACD Call for a different Group than the Group selected.

◗ **ACD Held** - Agent currently has an ACD Call on hold.

◗ **ACD Conference** - Agent is currently on an ACD Conference Call.

◗ **Intercom** - Agent is currently on an Intercom Call.

◗ **Incoming** - Agent is currently on a Non-ACD Incoming Call.

◗ **Outgoing** - Agent is currently on a Non-ACD Outgoing Call.

## *Selected Group Status*

The current status of the Group selected is displayed near the bottom of the screen:

◗ **Logged In** - number of Agents logged in for this Group.

◗ **Logged Out** - number of Agents logged out for this Group.

◗ **Available** - number of Agents available for this Group.

◗ **Unavailable** - number of Agents unavailable for this Group.

◗ **ACD** - number of ACD Calls currently being handled by this Group.

◗ **ACD (Group)** - number of ACD Calls from other Groups beings handled by this Group.

◗ **Wrap** - number of Agents currently in wrap for this Group.

◗ **Intercom** - number of Agents on Intercom Calls.

◗ **Incoming** - number of Agents on Non-ACD Incoming Calls for this Group.

◗ **Outgoing** - number of Agents on Outgoing Calls for this Group.

## *Voice Port States*

At the bottom of the screen, the current state of each of the 16 Voice Ports is displayed.

There are 8 Voice Port states:

◗ **Config** - Voice Port is currently being configured.  If Voice Port is connected, this state will change to IDLE; if not, this state will change to UNUSED.

◗ **Idle** - available but not active.

◗ **Recording** - a call or an announcement.

◗ **Playing** - a recorded call or a recorded announcement.

◗ **Waiting** - in use but holding for user intervention, preparing to play an announcement, or for an ATA to clear.

◗ **Initing** - port is trying to reset from an error that occurred.

◗ **Disabled** - not in use due to failure.

◗ **Unused** - not connected.

In this section steps are provided so you can perform the following tasks:

◗ Access the Group Status screen.

◗ Select a Group and Display Statistics for that Group.

Follow this step to **access the Group Status screen** from the Status Menu:

**1** On the Status Menu, move cursor to highlight **Group Status Display** and press **ENTER/CLICK**.  The next screen to display:

```
                    Group     DEMO GRP                    DAY Routing

   Statistics              ID #      Agent Name          Status        Dur

Calls Queued         2    101  J. HIGGINS       ACD                    01:35
Longest Queued    00:25    102  G. CONNOR        ACD (GROUP 2)          00:43
Calls Overlw Out   354    103  M. JONES         WRAP                   00:05
                           104  Q. ADAMS         ACD HELD               02:05
Calls Answered     233    105  E. MONROE        UNAVAILABLE            07:12
Avg Time/Answer   00:20    106  R. SANDSTRUM     ACD CONFERENCE         03:49
T.S.F %             67    107  P. GRAMBLE       AVAILABLE              02:05
Longest Wait      00:52    108  R. FANELSEK      OUTGOING              05:45
Calls Abandoned     11    109  T. PRATT         LOGGED OUT
Avg Time/Aband    00:45
Calls Discncted      6
Calls Xferred        9

  Logged In    8     Available     1   ACD             3    Intercom    0
  Logged Out   1     Unavailable   1   ACD (Group)     1    Incoming    0
                                       Wrap            1    Outgoing    1

   1  2  3  4  5  6  7  8  9 10 11 12 13 14 15 16    Play/Rec  Idle     Waiting
  17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32    Cfg/Init  Unused   Disabled
```

Follow either step to **select a Group and display statistics for that Group**:

**1** When the Group Status Display screen displays, the cursor will be positioned on the **Group Number field** at the top center of the screen. Type in up to **2** numeric characters for **Group Number** and press **ENTER**. The Group's Statistics will display.

(or)

Press **F2/DBL CLICK** to display the list of Group Numbers. Move cursor to highlight **Group Number** and press **ENTER/CLICK** to select. The Group Number and Statistics will display.

Follow either step to display another Group.

*Notes: The call statistics reset to zero when a Group's Routing Hours cycle from DAY to NIGHT, NIGHT to DAY . . .*

*If you want to view the About ACD screen while on the Group Status screen, press the F7 key.*

*If an Unavailable Duration value was specified on the Group Configuration screen, the Unavailable field will flash for an Agent who remains unavailable longer than the specified duration. When the Agent becomes Available, the field will no longer flash.*

# System Status Display

The System Status Display screen displays real-time Call Processing Statistics for 8 Groups at a time. You will be able to monitor Group performances and identify problems as they occur.

### Call Processing Statistics

❱ **Routing** - each Group's Routing Table (DAY or NIGHT).

❱ **Logged In** - number of Agents logged in to each Group.

❱ **Logged Out** - number of Agents logged out of each Group.

❱ **Available** - number of Agents available for ACD calls in each Group.

❱ **ACD** - number of ACD Calls currently active by each Group.

❱ **Wrap** - number of Agents currently in wrap for each Group.

❱ **Unavailable** - number of unavailable Agents for each Group; includes Agents indicating manually their unavailability and Agents on Non-ACD incoming, outgoing, or intercom calls.

❱ **Calls Queued** - number of calls in the queue for each Group.

❱ **Longest Queued** - length of time (MM:SS) the oldest call has been in queue.

❱ **Calls Overflowed Out** - total number of calls overflowed out of one Group and answered by other Groups.

❱ **Calls Answered** - total number of calls answered by each Group.

❱ **Average Time To Answer** - average length of time (MM:SS) each Group of Agents answer calls during current routing cycle.

❱ **Calls Abandoned** - total number of calls abandoned during current routing cycle.

❱ **Average Time To Abandon** - average length of time (MM:SS) a caller waited in queue before hanging up. This average is for Group's current routing cycle.

❱ **Calls Disconnected** - the number of times calls were disconnected for each Group manually and by the DISCONNECT Routing Command.

❱ **Calls Transferred** - the number of times calls were transferred for each Group by the TRANSFER TO, GROUP, LINE XFER, LINK XFER, CDR TABLE, or VMAIL XFER Routing Commands.

### Voice Port States

At the bottom of the screen, the current state of each of the 32 Voice Ports is displayed.

There are 8 Voice Port states:

❱ **Config** -Voice Port is currently being configured. If Voice Port is connected, this state will change to IDLE; if not, this state will change to UNUSED.

❱ **Idle** - available but not active.

❱ **Recording** - a call or an announcement.

❱ **Playing** - a recorded call or a recorded announcement.

❱ **Waiting** - in use but holding for user intervention, preparing to play an announcement, or for an ATA to clear.

❱ **Initing** - port is trying to reset from an error that occurred.

❱ **Disabled** - not in use due to failure.

❱ **Unused** - not connected.

In this section steps are provided so you can perform the following tasks:

❱ Access the System Status screen.

❱ Display Statistics for another set of 8 Groups.

Follow this step to access the System Status screen from the Status Menu:

**1** On the Status Menu, highlight **System Status** and press **ENTER/CLICK**. The System Status will display:

```
                    CINPHONY (123456)              7% Disk Full

 Group Statistics    1     2     3     4     5     6     7     8

 Routing            DAY   NITE  DAY   NITE  DAY   NITE  DAY   NITE
 Logged In           24    7     24    7     24    7     24    7
 Logged Out          5     8     5     8     5     8     5     8
 Available           9     1     9     1     9     1     9     1
 ACD                 11    3     11    3     11    3     11    3
 Wrap                3     2     3     2     3     2     3     2
 Unavailable         1     1     1     1     1     1     1     1
 Calls Queued        1     4     1     4     1     4     1     4
 Longest Queued     0:12  0:23  0:12  0:23  0:12  0:23  0:12  0:23
 Calls Ovrflw Out    12    8     12    8     12    8     12    8
 Calls Answered      512   235   512   235   512   235   512   235
 Avg Time To Answer 0:32  0:45  0:32  0:45  0:32  0:45  0:32  0:45
 Calls Abandoned     8     12    8     12    8     12    8     12
 Avg Time To Abandon 1:23 0:54  1:23  0:54  1:23  0:54  1:23  0:54
 Calls Disconnected  7     5     7     5     7     5     7     5
 Calls Transferred   12    19    12    19    12    19    12    19

  1  2  3  4  5  6  7  8  9 10 11 12 13 14 15 16   Play/Rec  Idle    Waiting
 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32   Cfg/Init  Unused  Disabled
```

To display statistics for all of the Groups:

- Press the **F5 Key** to display **1st. set of 8 Groups**.
- Press the **F7 Key** to display **last set of 8 Groups**.
- Press the **Right Arrow Key** or the **Tab Key** to display the next Group in sequence.
- Press the **Left Arrow** or the **Shift Tab Key** to display the previous Group in sequence.

Press ESC when you want to exit this screen.

*Note: The call statistics reset to zero when a Group's Routing Hours cycle from DAY to NIGHT, NIGHT to DAY . . .*

# Feature Codes

Follow these steps to display the Features Codes screen for **Agent** and **Supervisor Functions**:

> *Note: You will use these codes at the Station Set when performing Agent or Supervisor Functions. Refer to Using Norstar Station Sets chapter in this User Guide for detailed directions on use.*

**1** On the **Status Menu**, highlight **Feature Codes** and press **ENTER/CLICK** to display the Feature Codes screen.

```
01/08/99   9:15:27 am        CINPHONY (112233)          19% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell

                          Feature Codes Display

   Agent Functions  | Feature Code    Supervisor  Functions  | Feature Code

   LOGIN            |    903          REGISTER               |    909
   UNAVAILABLE      |    904          RETRIEVE MESSAGES       |    910
   CANCEL WRAP      |    905          ANNOUNCEMENT MAINTENANCE|    911
   HELP             |    906          MONITOR CALL            |    912
   CATEGORIZE       |    907          PLAY CALL               |    913
   RECORD CALL      |    908          EMERGENCY ROUTING       |    914
   CALLS QUEUED     |    918          GROUP STATUS            |    923


      Exit



Press ENTER/CLICK to return to Status Menu
```

## *Agent Functions*

◗ **LOGIN**

◗ **UNAVAILABLE**

◗ **CANCEL WRAP**

◗ **HELP** (CINPHONY I & II only)

◗ **CATEGORIZE**

◗ **RECORD CALL**  (CINPHONY I & II only)

◗ **CALLS QUEUED**

◗ **ANNOUNCEMENT MAINTENANCE** (PRELUDE only)

## *Supervisor Functions (CINPHONY I & II only)*

◗ **REGISTER**

◗ **RETRIEVE MESSAGES**

◗ **ANNOUNCEMENT MAINTENANCE**

◗ **MONITOR CALL**

◗ **PLAY CALL**

◗ **EMERGENCY ROUTING**

◗ **GROUP STATUS**

# About ACD

Follow these steps to display the About ACD (PRELUDE or CINPHONY) screen to view important information on the application you are currently using:

**1** On the **Status Menu**, highlight **About** and press **ENTER/CLICK** to display the About screen.

```
01/02/02  11:20:39 am          CINPHONY (123456)            7% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell

   Group St
   System S                         CINPHONY
   Feature       Level:      II        Version: v3.xx.xx
   About         Product ID: 123456
                 KSU String : N/A
                 Authorized Voice Ports: 32
                 Add-Ons:
                     Automated Attendant:    YES
                     Infocus-COM:    YES
                     Infocus-LAN:    YES
                     Wallboard:    YES
                     Caller Directed Routing:    YES


                         Copyright (c) 1991-2002
                         Cintech Solutions, Inc.
                         Press any key to continue




 Press ENTER/CLICK to display the About screen
```

The following information will display:

◗ **ACD Level**

◗ **ACD Version**

◗ **Your ACD Product ID**

◗ **Number of Voice Ports**

◗ **Add-Ons currently in use**

◗ **KSU String listing components and version**

◗ **Copyright information**

# Chapter 5: Reports

# Introduction

While ACD distributes calls for your call center, it also collects call data and processes this data so you can view the results on reports. There are 5 classifications for these Reports:

◗ **Agent Reports**

Agent Profile Report

Agent Profile Summary Report

Agent Profile by Group Report

◗ **Group Reports**

Group Profile Report

Group Overflow Report

Routing Table Report

◗ **Line Reports**

Line Profile Detail Report

Line Profile Summary Report

Busy Report

Destination Number (DNIS/DID) Report (CINPHONY I & II Levels only)

◗ **Categorization Reports**

Call Categorization Report

Category By Agent Report

◗ **System Reports**

ACD Call Profile Detail Report

ACD Call Profile Summary Report

Abandoned Report

Monthly Summary Report

System Configuration Report

There are 3 Report utilities you can utilize before and after Report generation:

◗ **Process Data** - before a Report can be generated, you must Process Data to get up to the minute data for reporting. Process Data is also required for most of the Maintenance Menu operations.

◗ **Scheduler** - you can schedule a Report to generate at a later date and time. Every scheduled Report processes data before generation.

◗ **Report/File Maintenance** - when you generate a Report to a File (.RPT or .HTM), the Report is listed on the Report/File Maintenance screen. There you can use this utility to copy or move Report to Drive A: (disks), print Report, delete Report, and view Report on the screen. When records are exported (Maintenance Menu operation), they are also listed, and you can copy or move them to Drive A: (disks).

*Note: A report generated to a .HTM format can only be deleted in Report/File Maintenance.*

# Process Data

**Before any Report is be generated, Data should be Processed to update the database to include the most current call activity.**

Follow these steps to access the Process Data screen and Update the database:

**Reports Menu**

**1** On the **Reports Menu**, highlight **Process Data** and press **ENTER/CLICK** to select. The Process Data screen will display.

```
01/02/99  11:33:14 am          CINPHONY (123456)          7% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell
                                   Process Data
                                   Agent Reports
                                   Group Reports
                                   Line Reports
                                  ─ Process Data ─
                            ┌                          ─────────────
                                                              Process
       Last Database Updated:    │ 12/08/98 09:01 am │
                                                              Exit

            └

    Press ENTER/CLICK to Process Data (F10 or Alt P also processes)
```

**2** Highlight the **Process** button and press **ENTER/CLICK** to select. (You can also press the **F10 key** or the **ALT-P keys** to process). You will receive a message: **Processing Data - X% complete**.

# Common Report Parameters

The following Report Parameters are common to all ACD Reports:

◗ From and Thru Ranges

 Date, Time, Group, Agent ID, Category, Line, and Topic.

◗ Output Device

 Printer, File, and Screen.

For all ACD Reports, you can change any of these parameters before generating the Report. This section will provide:

◗ From/Thru Rules.

◗ Directions to select Output Device.

◗ Directions to complete File Name if File has been selected for Output Device.

Directions to change the Report Parameters specific to each Report are covered in each Report's section.

## *From/Thru Rules*

◗ If From and Thru range fields are left blank, all data in entire database is reported unless other ranges are set.

◗ If From range field is completed and Thru range field is left blank, all data is reported from specified start to end of database unless other ranges are set.

◗ If Thru range field is completed and From range field is left blank, all data is reported from beginning of database to specified end unless other ranges are set.

◗ To report on one Parameter (e.g., Date), the variable must display in both the From and Thru fields.

 *Notes: Some From and Thru fields require that you type in the required information using a specific format, such as: From and Thru Date using the format MM/DD/YY.*

 *If Date Range is left blank, the default range will be 1/1/80 through 12/31/79 (January 1, 1980 through December 31, 2079).*

 *Other From and Thru fields require that you either type in the required information, or press F2/DBL CLICK to display list of choices, move cursor to highlight the choice, and press ENTER to select. For example, Agent ID or Group Number can be typed in or selected from F2 list.*

## *Output Device selection*

◗ Press **F2/DBL CLICK** to display list of Output Devices. Move cursor to highlight **Output Device** and press **ENTER/CLICK** to select. If **FILE** is selected, go to **Filename completion**.

 *Note: There are 6 Output Devices from which to select:*

 • *LPT1 - Parallel Printer Port*

 • *LPT2 - Parallel Printer Port*

 • *File (with Printer Codes)*

 • *File (without Printer Codes)*

 • *Screen (view only)*

 • *HTML (.HTM format for Infocus Status Display Reports)*

## *File Name completion*

◗ If either FILE was selected, you will need to type in a File Name. Type in up to **8** alphanumeric characters. The .RPT filename extension cannot be changed.

 *Note: When a Report is generated to File, this File is automatically listed in Report/File Maintenance (Reports Menu utility). You can then copy or move this Report to the A: Drive (disks), print the Report, Delete the Report or view the Report on screen.*

## *HTML completion*

◗ If either HTML was selected, you will need to type in a File Name.  Type in up to **8** alphanumeric characters.  The .HTM filename extension cannot be changed.

*Note: When a Report is generated to HTML, this File is automatically listed in Report/File Maintenance (Reports Menu utility).  You can only delete a HTML Report.  Refer to the Infocus Installation and User Guide for directions to view and print these Web Page Reports (.htm) on the Infocus Server PC or Infocus Client PC(s).*

# Agent Reports

**Agent Profile Report**

Agent's performance over a specified period of time.

**Agent Summary Report**

Summary of Agent's performance over a specified period of time.

**Agent Profile by Group Report**

Agent's performance by Group(s) over a specified period of time.

## Agent Profile Report

This Report summarizes the following:

◗ Amount of logged-in time.

◗ Amount of time spent on ACD Calls and how that time was spent (conversation, wrap time, etc.).

◗ Amount of time spent on Non-ACD Calls.

◗ Number of calls answered.

◗ Number of times Supervisor help was requested.

Follow these steps to Run the Report, for all data in database, to Output Device:

1   Access the **Agent Profile Report** screen.

```
01/02/99  11:34:14 am          CINPHONY (123456)               7% Disk Full

  Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                   Process Data
                                   Agent Reports
                            ─ Agent Profile Report ─
      Date Range            12/01/98 thru 01/01/99      Run Report
      Agent Range                    thru
                                                        Exit Report
      Page Break on Agent?  NO      (J)   YES      ( )
      Agent Call Type       ACD     (J)   NON-ACD ( )
      Report Method         DURATION (J)  PERCENT ( )
      Duration Format       HHH:MM:SS

      Output Device         LPT1
      File Name



  Type in From Agent, or press F2/DBL CLICK and select Agent from list
```

2   Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run (Generate) Report for all data in database.**

Refer to **Common Report Parameters** in this Chapter for directions and rules to specify the **From** and **Thru Data Ranges** and directions to change **Output Device**.

*Notes: Page Break on Agent ID default is YES; therefore, each Agent Profile will print on a separate page unless changed to NO (Agent data will print consecutively with normal page breaks).*

*You can generate 3 Styles of an Agent Profile Report:*

•   *ACD Duration*

•   *ACD Percent*

- *Non-ACD Duration*

*Duration Formats include:*
- *HHH:MM:SS = 010:20:30*
- *HHH:MM.S  = 010:20.5*
- *MMMM:SS   = 0620:30*
- z  *MMMM     = 0621 (30+ rounded up, -30 rounded down)*

**Note:** *If ACD, you can generate either a DURATION or PERCENT Report Style.  If Non-ACD, you can only generate a DURATION Report Style.*

**Report Field (Column) Definitions**

**ACD DURATION and PERCENT Reports**

- *LOG DATE - Agent login time period (within From/Thru range) listed in ascending order.*
- *LOG IN - time of day Agent logged in for time period.*
- *LOG OUT - time of day Agent logged out for time period (\* = auto logout, # = active Agent).*
- *LOGIN DURATION - how long Agent was logged in for time period.*
- *AVAILABLE - amount of ACD time, or percentage of time, Agent was active to take calls during time period.*
- *TALK - amount of ACD time, or percentage of time, Agent conversed with caller during time period.*
- *HOLD - amount of ACD time, or percentage of time, ACD callers were placed on hold during time period.*
- *WRAP - amount of ACD time, or percentage of time, Agent wrapped-up between calls during time period.*
- *UNAVAILABLE MANUAL - amount of ACD time, or percentage of time, Agent was inactive during time period; and, pressed the Unavailable Key to go inactive.*
- *UNAVAILABLE OTHER - amount of ACD time, or percentage of time, Agent was inactive during time period because of time spent on Non-ACD Calls.*
- *CALLS ANSWERED - number of ACD calls answered by Agent.*
- *SUPERVISOR HELP - number of help requests Agent sends to Supervisor by pressing the Help key.*

**Non-ACD DURATION Report**

- *LOG DATE, LOG IN, LOG OUT - same as ACD.*
- *LOGIN DURATION - same as ACD.*
- *INCOMING DURATION - amount of time Agent was on transferred and incoming Non-ACD Calls.*
- *INCOMING CALLS - number of transferred and incoming Non-ACD Calls.*
- *OUTGOING DURATION - amount of time Agent was on outgoing Non-ACD Calls.*
- *OUTGOING CALLS - number of outgoing Non-ACD Calls.*
- *INTERCOM CALLS - number of intercom calls.*
- *INTERCOM DURATION - amount of time Agent was on the Intercom.*
- *ACD TIME TOTAL DURATION - amount of time Agent spent on ACD activities.*

## Agent Summary Report

This Report summarizes the following:

◗ Amount of logged-in time for the day.

◗ Amount of time spent for the day on ACD Calls and how that time was spent (conversation, wrap time, etc.).

◗ Amount of time spent for the day on Non-ACD Calls.

◗ Number of calls answered for the day.

◗ Number of times Supervisor help was requested for the day.

Follow these steps to Run the Report, for all data in database, to Output Device:

**1** Access the **Agent Summary Report** screen.

```
01/02/99  11:34:14 am          CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell
                                           Process Data
                                           Agent Reports
                              ─Agent Summary Report─
       Date Range            12/01/98 thru 01/01/99      Run Report
       Agent Range                      thru
                                                          Exit Report
       Agent Call Type       ACD      (J)  NON-ACD ( )
       Report Method         DURATION (J)  PERCENT ( )
       Duration Format       HHH:MM:SS

       Output Device         LPT1
       File Name



   Type in From Agent, or press F2/DBL CLICK and select Agent from list
```

**2** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run (Generate) Report for all data in database.**

Refer to **Common Report Parameters** in this Chapter for directions and rules to specify the **From** and **Thru Data Ranges** and directions to change **Output Device**.

*Notes: Page Break on Agent ID default is YES; therefore, each Agent Profile will print on a separate page unless changed to NO (Agent data will print consecutively with normal page breaks).*

*You can generate 3 Styles of an Agent Summary Report:*

• *ACD Duration*

• *ACD Percent*

• *Non-ACD Duration*

*Duration Formats include:*

• *HHH:MM:SS = 010:20:30*

• *HHH:MM.S  = 010:20.5*

• *MMMM:SS   = 0620:30*

• *MMMM      = 0621 (30+ rounded up, -30 rounded down)*

*Note: If ACD, you can generate either a DURATION or PERCENT Report Style.  If Non-ACD, you can only generate a DURATION Report Style.*

*Report Field (Column) Definitions*

*ACD DURATION and PERCENT Reports*

- *LOG DATE - Agent login time period (within From/Thru range) listed in ascending order.*
- *LOG IN - time of day Agent logged in for time period.*
- *LOG OUT - time of day Agent logged out for time period (\* = auto logout, # = active Agent).*
- *LOGIN DURATION - how long Agent was logged in for a day.*
- *AVAILABLE - amount of ACD time, or percentage of time, Agent was active to take calls for the day.*
- *TALK - amount of ACD time, or percentage of time, Agent conversed with caller for the day.*
- *HOLD - amount of ACD time, or percentage of time, ACD callers were placed on hold for the day.*
- *WRAP - amount of ACD time, or percentage of time, Agent wrapped-up between calls for the day.*
- *UNAVAILABLE MANUAL - amount of ACD time, or percentage of time, Agent was inactive for the day; and, pressed the Unavailable Key to go inactive.*
- *UNAVAILABLE OTHER - amount of ACD time, or percentage of time, Agent was inactive for the day because of time spent on Non-ACD Calls.*
- *CALLS ANSWERED - number of ACD calls answered by Agent.*
- *SUPERVISOR HELP - number of help requests Agent sends to Supervisor by pressing the Help key.*

*Non-ACD DURATION Report*

- *LOG DATE, LOG IN, LOG OUT - same as ACD.*
- *LOGIN DURATION - same as ACD.*
- *INCOMING DURATION - amount of time Agent was on transferred and incoming Non-ACD Calls.*
- *INCOMING CALLS - number of transferred and incoming Non-ACD Calls.*
- *OUTGOING DURATION - amount of time Agent was on outgoing Non-ACD Calls.*
- *OUTGOING CALLS - number of outgoing Non-ACD Calls.*
- *INTERCOM CALLS - number of intercom calls.*
- *INTERCOM DURATION - amount of time Agent was on the Intercom.*
- *ACD TIME TOTAL DURATION - amount of time Agent spent on ACD activities.*

# Agent Profile By Group Report

This Report summarizes the following:

◗ Amount of logged-in time.
◗ Amount of time spent on ACD Calls and how that time was spent (conversation, wrap time, etc.).
◗ Amount of time spent on ACD Calls for each Group.
◗ Number of calls answered.
◗ Number of times Supervisor help was requested from Agents in the Group.

Follow this step to Run Report, for all data in database, to Output Device:

**Main Menu**

**1** Access the **Agent Profile By Group Report** screen.

```
01/02/99  11:36:20 am          CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control   DOS-Shell
  ┌──────────────────────────────────────────────────────┐
  │                          Process Data                  █
  │                          Agent Reports                 █
  │                      ┌──────────────────┐              █
  │                      │   Agent Profile  │              █
  │          ┌── Agent Profile By Group Report ──┐         █
  │          │                                   │┌──────────┐█
  │          │ Date Range      12/01/98 thru 01/01/99 │ Run Report │█
  │          │ Agent Range     101       thru 9999    │            │█
  │          │                                   ││ Exit Report│█
  │          │ Page Break on Agent?  NO    (J)  YES    ( )  ││          │█
  │          │ Report Method    DURATION (J)  PERCENT ( )  ││          │█
  │          │ Duration Format  HHH:MM:SS        ││          │█
  │          │                                   ││          │█
  │          │ Output Device    LPT1             ││          │█
  │          │ File Name                         ││          │█
  │          └───────────────────────────────────┘└──────────┘█
  │          ████████████████████████████████████████████████
  │
  │
  │ Press F2/DBL CLICK, highlight Duration Format, and press ENTER/CLICK
  └──────────────────────────────────────────────────────────┘
```

**2**  Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R)  to **Run (Generate) Report for all data in database.**

Refer to Common Report Parameters in this Chapter for directions and rules to specify the From and Thru Data Ranges and directions to change Output Device.

*Notes: Page Break on Agent ID default is YES; therefore, each Agent Profile by Group will print on its own page unless changed to NO (Agent data will print consecutively with normal page breaks).*

*You can generate 2 Styles of an Agent Profile by Group Report:*

- *ACD Duration*
- *ACD Percent*

*Duration Formats include:*

- *HHH:MM:SS = 010:20:30*
- *HHH:MM.S = 010:20.5*
- *MMMM:SS = 0620:30*
- *MMMM = 0621 (30+ rounded up, -30 rounded down)*

*Report Field (Column) Definitions*

**ACD DURATION and PERCENT Reports**

- *LOG DATE - Agent login time period (within From/Thru range) for each Group listed in ascending order.*
- *LOG IN - time of day Agent logged in for each Group for time period.*
- *LOG OUT - time of day Agent logged out for each Group for time period (\* = auto logout, # = active Agent).*
- *LOGIN DURATION - how long Agent was logged in for each Group for time period.*
- *AVAILABLE - amount of ACD Time, or percentage of time, Agent was active to take calls for each Group during time period.*
- *TALK - amount of ACD Time, or percentage of time, Agent conversed with caller for each Group during time period.*

- *ALTERNATE GROUP - amount of ACD Time, or percentage of time, Agent took calls from another Group.*

- *HOLD - amount of ACD Time, or percentage of time, ACD callers were placed on hold for each Group during time period.*

- *WRAP - amount of ACD Time, or percentage of time, Agent wrapped-up between calls for each Group during time period.*

- *UNAVAILABLE MANUAL - amount of ACD time, or percentage of time, Agent was inactive for each Group during time period; and, pressed the Unavailable Key to go inactive.*

- *UNAVAILABLE OTHER - amount of ACD time, or percentage of time, Agent was inactive for each Group during time period because of time spent on Non-ACD Calls.*

- *CALLS ANSWERED - number of ACD calls answered by Agent for each Group.*

- *SUPERVISOR HELP - number of help requests Agent sends to Supervisor for each Group by pressing the Help key.*

# Group Reports

**Group Profile Report**

Group's performance over a specified period of time.

**Group Overflow Report**

Overflow Group's performance over a specified period of time.

**Routing Table Report**

Details of Routing Table usage.

## Group Profile Report

This Report summarizes the following:

◗ Number of calls received.

◗ Whether calls were answered or abandoned.

◗ Average amount of time call spent in queue before answered or abandoned.

◗ Average amount of time spent on various aspects of ACD Calls.

◗ Number of auto-logouts and requests for Supervisor assistance.

Follow these steps to Run the Report, for all data in database, to Output Device:

**1** Access the **Group Profile** Report screen.

```
01/02/99  11:37:10 am          CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                   Process Data
                                   Agent Reports
                                   Group Reports

                                        Group Profile
                          Group Profile Report

             Date Range    12/01/98 thru 01/01/99    Run Report
             Time Range    00:00     thru 24:00
             Group Range             thru            Exit Report

             Output Device  LPT1
             File Name




   Type in From Group, or press F2/DBL CLICK and select Group from list
```

**2** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run (Generate) Report for all data in database**.

Refer to **Common Report Parameters** in this Chapter for directions and rules to specify the **From** and **Thru Data Ranges** and directions to change **Output Device**.

*Report Field (Column) Definitions*

• *CALLS RECEIVED - number of ACD Calls distributed to the Group.*

• *CALLS ANSWERED - number of ACD Calls answered by the Group*

• *CALLS ABANDONED - number of ACD Calls when the caller hung up before an Agent could answer the call.*

- *CALLS PICKED UP OR DISCONNECTED - calls answered on a station set other than the original station set by the Norstar "Pick-up" feature, or calls disconnected by the Disconnect Routing Command.*

- *CALLS TRANSFERRED - number of ACD Calls transferred out of ACD by the TRANSFER TO, LINE XFER, LINK XFER, CDR TABLE, or VMAIL XFER Routing Command.*

- *AVERAGE ANSWERED - average amount of ACD Time a caller waited before an Agent answered (total time all calls spent in queue divided by total number of answered calls).*

- *AVERAGE ABANDONED - average amount of ACD Time caller waited before hanging up (total time all calls spent in queue before being abandoned divided by total number of abandoned calls).*

- *AVERAGE TALK - average amount of ACD Time Agents spent conversing with callers (total time divided by number of answered calls).*

- *AVERAGE HOLD - average amount of ACD Time Agents kept callers on hold (total time divided by total number of answered calls).*

- *AVERAGE WRAP - average amount of ACD Time Agents spent on wrap-up (total time divided by total number of answered calls).*

- *AUTO LOGOUT - number of automatic logouts for the Group without the Agents manually logging out or going unavailable.*

- *SUPERVISOR HELP - number of requests for Supervisor Help from the Group.*

## Group Overflow Report

This Report summarizes the following:

◗ Number of ACD Calls overflowing to other Groups, which Groups received these calls, and the number of calls received by each Group.

◗ Number of ACD Calls overflowing from other Groups to this Group.

◗ Total number of calls received, answered, and abandoned.

Follow these steps to Run the Report, for all data in database, to Output Device:

**1** Access the **Group Overflow Report** screen.

```
01/02/99  11:38:07 am           CINPHONY (123456)            7% Disk Full

  Status    Configuration    Reports   Maintenance    ACD Control   DOS-Shell

                                   Process Data
                                   Agent Reports
                                   Group Reports

                                     Group Profile
                          ─ Group Overflow Report ─

            Date Range    12/01/98 thru 01/01/99   Run Report
            Time Range    00:00    thru 24:00
            Group Range            thru            Exit Report

            Output Device  LPT1
            File Name




  Type in From Group, or press F2/DBL CLICK and select Group from list
```

**2** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run (Generate) Report for all data in database**.

Refer to **Common Report Parameters** in this Chapter for directions and rules to specify the **From** and **Thru Data Ranges** and directions to change **Output Device**.

*Report Field (Column) Definitions*

• *OUTGOING OVERFLOW GROUPS - The Overflow Group(s) Number is listed in the column heading. The column lists the number of calls overflowed to this Group(s) from the Subject Group. The outgoing overflowed calls are totaled at the end of the row.*

• *INWARD OVERFLOW - total number of calls that overflowed from other Groups to the Subject Group specified.*

• *CALLS RECEIVED - number of ACD Calls received by the Subject Group.*

• *CALLS ANSWERED - number of ACD Calls answered by the Subject Group.*

• *CALLS ABANDONED - number of ACD Calls when the caller hung up before an Agent could answer the call.*

• *PICKED UP OR DISCONNECTED - calls answered on a station set other than the original station set by the Norstar "Pick-up" feature, or calls disconnected by the Disconnect Routing Command.*

• *TRANSFERRED - number of ACD Calls for Subject Group transferred by GROUP Command, or by the TRANSFER TO Command to a Norstar DN, or by the LINK XFER, LINE XFER, CDR TABLE, or VMAIL XFER Commands.*

# Routing Table Report

This Report displays the following:

◗ Step Number, Routing Command, and Value for the Day and Night Routing Tables.

◗ Number and percentage of all calls reaching each Step on the Routing Command Table.

Follow these steps to **Run the Report, for all data in database, to Output Device**:

**1** Access the **Routing Table Report** screen.

```
01/02/99  11:38:38 am         CINPHONY (123456)            7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control   DOS-Shell

                                  Process Data
                                  Agent Reports
                                  Group Reports
                           ─ Routing Table Report ─
                                                              Run Report
          Date Range          12/01/98 thru 01/01/99
          Time Range          00:00    thru 24:00            Exit Report
          Group Range                  thru

          Page Break on Group?  NO  (√)  YES   ( )

          Output Device        LPT1
          File Name

   Type in From Group, or press F2/DBL CLICK and select Group from list
```

**2** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run Report for all data in database.**

Refer to Common Report Parameters in this Chapter for directions and rules to specify the From and Thru Data Ranges and directions to change Output Device.

***Report Field (Column) Definitions***

- *STEP - number of the step in the Routing Table.*

- *COMMAND - Routing Command for Step.*

- *VALUE - value for Routing Command.*

- *COUNT - number of calls that reached a Step in the Routing Table. If the GO TO STEP command is used, the COUNT is incremented because the call is looped back to a step.*

- *% CALLS - percentage of calls that reached a Step in the Routing Command Table.*

# Line Reports

**Line Profile Detail Report**

Detail of ACD Line usage.

**Line Profile Summary Report**

Summary of ACD Line usage.

**Busy Report**

A Summary of when all lines assigned to an ACD Group were busy, at what times they were busy, and for how long they were busy.

**Destination Number (DNIS/DID) Report**

Summary of DNIS and DID Line usage.

## Line Profile Detail Report

This Report details the following:

◗ Number and duration of all calls received during specified intervals.

◗ Summary of ACD call activities during specified intervals.

◗ Number and duration of all Incoming and Outgoing Calls during specified intervals.

◗ Percentage of the interval that Line was in use.

Follow these steps to **Run Report, for all data in database, to Output Device**:

**1** Access the **Line Profile Detail Report** screen.

```
01/02/99  11:39:57 am          CINPHONY (123456)           7% Disk Full

    Status    Configuration    Reports    Maintenance    ACD Control   DOS-Shell

                                     Process Data
                                     Agent Reports
                                     Group Reports
                                     Line Reports
                        ─────Line Profile Detail Report─────

            Date Range          12/01/98 thru 01/01/99     Run Report
            Time Range          08:00     thru 17:30
            Line Range                    thru             Exit Report

            Page Break on Line?   NO  (J)   YES  ( )

            Output Device         LPT1
            File Name


    Type in From Line, or press F2/DBL CLICK and select from list (01-184)
```

**2** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run (Generate) Report for all data in database**.

Refer to Common Report Parameters in this Chapter for directions and rules to specify the From and Thru Data Ranges and directions to change Output Device.

*Note: Page Break on Line default is YES; therefore, each Line will print on its own page. If NO, Lines will follow on the same page and page breaks will occur normally.*

*Report Field (Column) Definitions*

• *DATE - the Date for the data on this row.*

- *TIME PERIOD - 30 minute time periods within the From/Thru Date range. The time periods are in ascending order (earliest to latest).*
- *TOTAL CALLS - number of calls received on the Line during the specified time period for the day.*
- *TOTAL DURATION - duration for all calls received on the Line during the time period for the day.*
- *CALLS RECEIVED - number of ACD Calls distributed to Agents during the time period for the day.*
- *CALLS ANSWERED - number of ACD Calls answered by Agents during the time period for the day.*
- *ACD DURATION - total amount of ACD Time during the time period for the day.*
- *CALLS ABANDONED - number of ACD Calls when the caller hung up before an Agent could answer the call.*
- *ABANDONED DURATION - length of time callers waited for Agents before hanging up the receiver, during the time period for the day.*
- *CALLS PICKED UP OR DISCONNECTED - calls answered on a station set other than the original station set by the Norstar "Pick-up" feature, or calls disconnected by the Disconnect Routing Command.*
- *CALLS TRANSFERRED - number of ACD Calls transferred, by the TRANSFER TO, LINE XFER, LINK XFER, CDR TABLE, or VMAIL XFER Routing Commands, or to another Group by the GROUP Command, during the time period for the day.*
- *INCOMING CALLS - number of Non-ACD Calls received on this Line, during the time period for the day.*
- *INCOMING DURATION - length of time for all Non-ACD Calls received on this Line.*
- *OUTGOING CALLS - number of Non-ACD Calls received on this Line, during the time period for the day.*
- *OUTGOING DURATION - length of time for all Non-ACD Calls received on this Line, during the time period for the day.*
- *% TIME BUSY - percentage of the time period that Line was in use.*

## Line Profile Summary Report

This Report summarizes the following:

◗ Number and duration of all calls received for the day.

◗ Summary of ACD call activities for the day.

◗ Number and duration of all Incoming and Outgoing Calls for the day.

◗ Percentage of the interval that Line was in use.

Follow these steps to **Run Report, for all data in database, to Output Device**:

1   Access the **Line Profile Summary Report** screen.

```
01/02/99  11:39:57 am          CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell
                                    Process Data                   █
                                    Agent Reports
                                    Group Reports
                                    Line Reports
                          ─Line Profile Summary Report─
                                                              ┌──────────────  █
        Date Range           12/01/98 thru 01/01/99           Run Report
        Time Range           08:00      thru 17:30
        Line Range                      thru                  Exit Report

        Page Break on Line?   NO  (J)   YES  ( )

        Output Device         LPT1
        File Name


 Type in From Line, or press F2/DBL CLICK and select from list (01-184)
```

2   Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run (Generate) Report for all data in database**.

Refer to Common Report Parameters in this Chapter for directions and rules to specify the From and Thru Data Ranges and directions to change Output Device.

*Note: Page Break on Line default is YES; therefore, each Line will print on its own page. If NO, Lines will follow on the same page and page breaks will occur normally.*

***Report Field (Column) Definitions***

• *DATE - the Date for the data on this row.*

• *TIME PERIOD - 30 minute time periods within the From/Thru Date range.  The time periods are in ascending order (earliest to latest).*

• *TOTAL CALLS - number of calls received on the Line for the day.*

• *TOTAL DURATION - duration for all calls received on the Line for the day.*

• *CALLS RECEIVED - number of ACD Calls distributed to Agents for the day.*

• *CALLS ANSWERED - number of ACD Calls answered by Agents for the day.*

• *ACD DURATION - total amount of ACD Time for the day.*

• *CALLS ABANDONED - number of ACD Calls when the caller hung up before an Agent could answer the call.*

• *ABANDONED DURATION - length of time callers waited for Agents before hanging up the receiver, for the day.*

- *CALLS PICKED UP OR DISCONNECTED - calls answered on a station set other than the original station set by the Norstar "Pick-up" feature, or calls disconnected by the Disconnect Routing Command.*
- *CALLS TRANSFERRED - number of ACD Calls transferred, by the TRANSFER TO, LINE XFER, LINK XFER, CDR TABLE, or VMAIL XFER  Routing Commands, or to another Group by the GROUP Command, for the day.*
- *INCOMING CALLS - number of Non-ACD Calls received on this Line, for the day.*
- *INCOMING DURATION - length of time for all Non-ACD Calls received on this Line.*
- *OUTGOING CALLS - number of Non-ACD Calls received on this Line, for the day.*
- *OUTGOING DURATION - length of time for all Non-ACD Calls received on this Line, for the day.*
- *% TIME BUSY - percentage of the time period that Line was in use.*

## Busy Report

This Report displays the following:

◗ The Date, Start Time, End Time, and Duration when all Lines, for an ACD Group, are busy.

◗ The total length of time that all Lines within an ACD Group are busy.

Follow these steps to Run the Report, for all data in database, to Output Device:

**1** Access the **Busy Report** screen.

```
01/02/99  11:40:40 am          CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control   DOS-Shell

                                      Process Data
                                      Agent Reports
                                      Group Reports
                                      Line Reports
                              ┌─────── Busy Report ───────┐
                              │                           │
         Date Range        12/01/98 thru 01/01/99    Run Report
         Time Range        00:00     thru 24:00
         Group Range                 thru            Exit Report

         Print Detail?     NO  ( )  YES   (✓)

         Output Device     LPT1
         File Name


   Type in From Group, or press F2/DBL CLICK and select Group from list
```

**2** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run (Generate) Report for all data in database**.

Refer to Common Report Parameters in this Chapter for directions and rules to specify the From and Thru Data Ranges and directions to change Output Device.

*Report Field (Column) Definitions*

• *GROUP - the targeted Group.*

• *ASSIGNED LINES - the Lines assigned to targeted Group.*

• *DATE - the month, day, and year that all lines assigned to an ACD Group were busy.*

• *START TIME - the time of day that all lines assigned to an ACD Group started being busy.*

• *END TIME - the time of day that all lines assigned to an ACD Group ended being busy.*

• *DURATION ASSIGNED LINES BUSY - length of time (between START and END TIME) that all lines assigned to an ACD Group were busy.*

## Destination Number (DNIS/DID) Report

This Report is available for only CINPHONY I & II Levels.

This Report summarizes the following:

◗ Number of calls received using DNIS and DID.

◗ Summary of ACD call activities.

Follow these steps to Run Report, for all data in database, to Output Device:

**1** Access the **Destination Number (DNIS/DID)  Report** screen.

```
01/02/99  11:41:32 am           CINPHONY (123456)           7% Disk Full

    Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                      Process Data
                                      Agent Reports
                                      Group Reports
                                      Line Reports
                    — Destination Number (DNIS/DID) Report —

        Date Range          12/01/98    thru   01/01/99      Run Report
        Time Range          00:00       thru   24:00
        Dest Number Range   00          thru   9999999999    Exit Report

        Output Device       LPT1
        File Name




    Press F2/DBL CLICK and select Output Device from list
```

**2** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run (Generate) Report for all data in database**.

Refer to Common Report Parameters in this Chapter for directions and rules to specify the From and Thru Data Ranges and directions to change Output Device.

***Report Field (Column) Definitions***

- *DATE  - the From/Thru Date Range for the data on this row.*

- *TIME - the From/Thru Time.*

- *CALLS RECEIVED - number of ACD Calls distributed to Agents during the time period for the day.*

- *CALLS ANSWERED - number of ACD Calls answered by Agents during the time period for the day.*

- *CALLS ABANDONED - number of ACD Calls when the caller hung up before an Agent could answer the call.*

- *CALLS PICKED UP OR DISCONNECTED - calls answered on a station set other than the original station set by the Norstar "Pick-up" feature, or calls disconnected by the Disconnect Routing Command.*

- *CALLS TRANSFERRED - number of ACD Calls transferred, by the TRANSFER TO, LINE XFER, LINK XFER, CDR TABLE, or VMAIL XFER Routing Commands, or to another Group by the GROUP Command, during the time period for the day.*

- *AVERAGE ANSWERED - average amount of ACD Time a caller waited before Agent answered (total time all calls spent in queue divided by total number of answered calls).*

- *AVERAGE ABANDONED - average amount of ACD Time caller waited before hanging up (total time all calls spent in queue before being abandoned divided by total number of abandoned calls).*

- *AVERAGE TALK - average amount of ACD Time spent conversing with callers (total time divided by number of answered calls).*

- *AVERAGE HOLD - average amount of ACD Time Agents kept callers on hold (total time divided by total number of answered calls).*

- *AVERAGE WRAP - average amount of ACD Time Agents spent on wrap-up (total time divided by total number of answered calls).*

# Categorization Reports

**Call Categorization Report**

A count of all categories used during a specified time period.

**Category By Agent Report**

A Count of the Categories entered by each Agent within a specified time period.

## Call Categorization Report

This Report displays the following:

◗ Number of calls logged for each category within the reporting period.

Follow these steps to Run the Report, for all data in database, to Output Device:

**1** Access the **Call Categorization Report** screen.

```
01/02/99  11:42:03 am           CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                    Process Data
                                    Agent Reports
                                    Group Reports
                                    Line Reports
                                    Categorization Reports
                        ─ Call Categorization Report ─

      Date Range        12/01/98      thru 01/01/99      Run Report
      Time Range        00:00         thru 24:00
      Category Range                  thru               Exit Report

      Output Device     LPT1
      File Name




   Type in the From Group, or press F2/DBL CLICK to select group from list
```

**2** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R)  to **Generate Report for all data in database.**

Refer to Common Report Parameters in this Chapter for directions and rules to specify the From and Thru Data Ranges and directions to change Output Device.

***Report Field (Column) Definitions***

• *CATEGORY NUMBER - number assigned to call.  Agent enters category number on station set when call is completed.*

• *CATEGORY DESCRIPTION - the brief description assigned to the Category Number on the Categorization Code screen from the Configuration Menu.*

• *TOTAL - number of calls assigned a Category Code during the specified wrap period.*

## Category By Agent Report

This Report displays the following:

◗ Number of calls logged for each Category by Agent during a specified wrap period.

◗ If Category Description was entered during Configuration, it will also display.

Follow these steps to Run the Report, for all data in database, to Output Device:

**1** Access the **Category By Agent Report** screen.

```
01/02/99  11:42:34 am          CINPHONY (123456)              7% Disk Full

  Status    Configuration    Reports    Maintenance    ACD Control   DOS-Shell

                                    Process Data
                                    Agent Reports
                                    Group Reports
                            ┌─ Category by Agent Report ─┐
                            │                            ├──────────────┐
           Date Range       │ 12/01/98 thru 01/01/99     │ Run Report   │
           Time Range       │ 00:00     thru 24:00       │              │
           Agent Range      │           thru             │ Exit Report  │
                            │                            │              │
           Page Break on Agent?  NO  (J)    YES  ( )     │              │
                            │                            │              │
           Output Device    │ LPT1                       │              │
           File Name        │                            │              │
                            └────────────────────────────┴──────────────┘


   Type in From Agent, or press F2/DBL CLICK and select Agent from list
```

**2** Press the **F10 Key**(or highlight Run and press ENTER/CLICK, or press ALT-R) to **Generate Report for all data in database.**

Refer to Common Report Parameters in this Chapter for directions and rules to specify the From and Thru Data Ranges and directions to change Output Device.

*Report Field (Column) Definitions*

- *CATEGORY NUMBER - the number representing a specific call category. It is entered by Agent on the Station Set for each call received. If Agent does not enter a Category Number, NO ENTRY will display in the CATEGORY NUMBER column.*

- *CATEGORY DESCRIPTION - an alphanumeric description of the Call Category. If entered for the Category Number during Configuration, it will display beside the Category Number on the Report.*

- *TOTAL - the total number of calls for a particular Category. If Category Number was not entered, there will also be a NO ENTRY total for each Agent.*

# System Reports

**ACD Call Profile Detail Report**

A Count by Group of ACD Calls received during specified time period and how long it took to answer, abandon, or route calls.

**ACD Call Profile Summary Report**

A Count by Group of ACD Calls received for the day and how long it took to answer, abandon, or route calls.

**Abandoned Call Report**

A Count of ACD Calls that were abandoned for a Group and Line during a specified time period, and the time it took before the call was abandoned.

**Monthly Summary Report**

Summary of entire system or Group performance for each day of the month.

**System Configuration Report**

Detailed information of selections made on the Configuration screens.

## ACD Call Profile Detail Report

This Report provides the time it took for each ACD Call to be in queue before being answered, abandoned, picked up and/or disconnected, or transferred.  This call data is listed in half hour increments for the time period specified.  This Report displays the following:

◗ Number of answered calls.

◗ Number of abandoned calls.

◗ Number of calls picked up and/or disconnected.

◗ Number of calls transferred.

Follow these steps to Run the Report, for all data in database, to Output Device:

**1** Access the **ACD Call Profile Detail Report**.

```
01/02/99  11:43:18 am          CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                    Process Data           ■
                           ACD Call Profile Detail Report

         Date Range            12/01/98 thru 01/01/99      No.  │  Time Block
         Time Range            08:00     thru 17:30
         Group Range                     thru               1   │      5
                                                            2   │     10
         Page Break On Group?  NO   (√)  YES      ( )       3   │     15
         Report Method         COUNT (√)  PERCENT ( )       4   │     20
                                                            5   │     25
         Output Device         LPT1                         6   │     30
         File Name                                          7   │     40
                                                            8   │     50
                                                            9   │     60
           Run Report         Exit Report                  10  │     75



    Type in From Group, or press F2/DBL CLICK to select Group from list
```

**2** Press the **F10 Key** to **Run (Generate) Report for all data in database**.

Refer to **Common Report Parameters** in this Chapter for directions and rules to specify the **From** and **Thru Data Ranges** and directions to change **Output Device**.

*Notes:  If Page Break on Group is YES, each Group will print on its own page.  If NO, the next Group will follow on the same page and page breaks will occur normally.*

*You can generate 2 Styles of an ACD Call Profile Detail Report:*

- *Count*

- *Percent*

*Default Time Intervals for Blocks 1-15 are 5, 10, 15, 20, 25, 30, 40, 50, 60, 75, 90, 120, 150, 180, and 210.  These blocks can be changed by the user.*

*For example,  to track number of calls answered every 15 seconds, type 15 in Block 1, 30 in Block 2, 45 in Block 3 ...*

### Report Field (Column) Definitions

### ACD COUNT and PERCENT Reports

- *TIME PERIOD - 30 minute time periods within the From/Thru Time range where calls are profiled as to being abandoned, picked up and disconnected, or transferred.  The time periods are in ascending order (earliest to latest).*

- *TIME IN SECONDS AND BLOCK # - number of seconds specified for a column (15 blocks of time). Each block of time displays the number of calls answered, abandoned, picked up and disconnected, and transferred within its time interval for each  30 minute time period. The time intervals are also in ascending order.*

- *ABANDONED - number of ACD Calls in a block for a time period that were abandoned because  the caller hung up before an Agent could answer the call.*

- *PICKED UP OR DISCONNECTED - calls answered on a station set other than the original station set by the Norstar "Pick-up" feature, or calls disconnected by the Disconnect Routing Command.*

- *TRANSFERRED - number of ACD Calls in a block for a time period transferred to a Norstar DN using the TRANSFER TO, LINE XFER, LINK XFER, CDR TABLE, or VMAIL XFER Routing Commands, or to another Group by the GROUP Command.*

- *Telephone Service Factor (T.S.F. %) - percentage of calls answered within the Time in Seconds interval (block).*

# ACD Call Profile Summary Report

This Report provides the time it took for each ACD Call to be in queue before being answered, abandoned, picked up and/or disconnected, or transferred. This call data is calculated in totals for each time block within each day specified. This Report displays the following:

◗ Number of answered calls for the day.

◗ Number of abandoned calls for the day.

◗ Number of calls picked up and/or disconnected for the day.

◗ Number of calls transferred for the day.

Follow these steps to Run the Report, for all data in database, to Output Device:

1 Access the **ACD Call Profile Summary Report**.

```
01/02/99  11:43:18 am          CINPHONY (123456)              7% Disk Full

   Status   Configuration    Reports   Maintenance   ACD Control   DOS-Shell

                              Process Data                    ■
               ACD Call Profile Summary Report
                                                    ┌──────┬─────────────┐
      Date Range          12/01/98 thru 01/01/99    │ No.  │  Time Block │
      Time Range          08:00     thru 17:30      │      │             │
      Group Range                   thru            │  1   │      5      │
                                                    │  2   │     10      │
      Page Break On Group?  NO   (J)  YES    ( )    │  3   │     15      │
      Report Method       COUNT (J)  PERCENT ( )    │  4   │     20      │
                                                    │  5   │     25      │
      Output Device       LPT1                      │  6   │     30      │
      File Name                                     │  7   │     40      │
                                                    │  8   │     50      │
                                                    │  9   │     60      │
      Run Report       Exit Report                  │ 10   │     75      │
                                                    └──────┴─────────────┘

   Type in From Group, or press F2/DBL CLICK to select Group from list
```

2 Press the **F10 Key** to **Run (Generate) Report for all data in database**.

Refer to **Common Report Parameters** in this Chapter for directions and rules to specify the **From** and **Thru Data Ranges** and directions to change **Output Device**.

*Notes: If Page Break on Group is YES, each Group will print on its own page. If NO, the next Group will follow on the same page and page breaks will occur normally.*

*You can generate 2 Styles of an ACD Call Profile Summary Report:*

• *Count*

• *Percent*

*Default Time Intervals for Blocks 1-15 are 5, 10, 15, 20, 25, 30, 40, 50, 60, 75, 90, 120, 150, 180, and 210. These blocks can be changed by the user.*

*For example, to track number of calls answered every 15 seconds, type 15 in Block 1, 30 in Block 2, 45 in Block 3 ...*

***Report Field (Column) Definitions***

***ACD COUNT and PERCENT Reports***

• *TIME IN SECONDS AND BLOCK # - number of seconds specified for a column (15 blocks of time). Each block of time displays the number of calls answered, abandoned, picked up and disconnected, and transferred.*

- *ABANDONED - number of ACD Calls in a block for a time period that were abandoned because the caller hung up before an Agent could answer the call.*

- *PICKED UP OR DISCONNECTED - calls answered on a station set other than the original station set by the Norstar "Pick-up" feature, or calls disconnected by the Disconnect Routing Command.*

- *TRANSFERRED - number of ACD Calls in a block of time transferred to a Norstar DN using the TRANSFER TO, LINE XFER, LINK XFER, CDR TABLE, or VMAIL XFER Routing Commands, or to another Group by the GROUP Command.*

- *Telephone Service Factor (T.S.F. %) - percentage of calls answered within a block of time).*

## Abandoned Calls Report

This Report summarizes the following:

◗ Group, Date, Line, Time, and Duration of each Call Abandoned during a specified Time Period. If available, ANI/ICLID and DNIS/DID Numbers will be included.

◗ Total number of abandoned Calls, total length of time that all Calls spent in queue before being abandoned, and average length of time that all Calls spent in queue before being abandoned.

Follow these steps to Run the Report, for all data in database, to Output Device:

**1** Access the **Abandoned Calls Report** screen.

```
01/02/99  11:43:58 am        CINPHONY (123456)           7% Disk Full

  Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                    Process Data
                                    Agent Reports
                                    Group Reports
                                    Line Reports
                              ┌──── Abandoned Calls ────┐
                                                        
      Date Range         12/01/98 thru 01/01/99    Run Report
      Time Range         00:00     thru 24:00
      Group Range                  thru            Exit Report

      Page Break on Group?  NO  (J)   YES  ( )

      Output Device      LPT1
      File Name



  Type in From Group, or press F2/DBL CLICK and select Group from list
```

**2** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Run (Generate) Report for all data in database**.

Refer to **Common Report Parameters** in this Chapter for directions and rules to specify the **From** and **Thru Data Ranges** and directions to change **Output Device**.

*Report Field (Column) Definitions*

- *DATE - month, day, and year the ACD Call was abandoned.*

- *LINE - the Line on which the ACD was received and abandoned.*

- *TIME - time of day that the ACD Call was received on the Line.*

- *DURATION - the length of time an ACD Call spent in queue before being abandoned.*

- *INCOMING NUMBER AND NAME - the ICLID/ANI Number and Name of caller (ICLID only) or DNIS/DID Number that was abandoned.*

# Monthly Summary Report

This Report summarizes the following:

◗ Number of calls received, answered, or abandoned.

◗ Average time spent on various aspects of ACD Calls.

◗ Number of Auto-Logouts and requests for Supervisor help.

◗ Number of incoming, outgoing, and intercom calls made during reporting period.

Follow these steps to Run Report, for all data in database, to Output Device:

**1** Access the **Monthly Summary Report** screen.

```
 01/02/99  11:44:18 am          CINPHONY (123456)            7% Disk Full

    Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                     Process Data
                                     Agent Reports
                                     Group Reports
                             ── Monthly Summary Report ──
            Month            JUNE                         Run Report
            Year             1999
                                                          Exit Report
            Group Range              thru

            Output Device    LPT1
            File Name

 Press F2/DBL CLICK, highlight Month, and press ENTER/CLICK to select
```

**Month**

**2** Type in the **full name of the Month** and press **ENTER**.

(or)

Press the **F2/DBL CLICK** to display the list of Months. Move cursor to highlight **Month** and press **ENTER/CLICK**. Cursor moves to the Year field.

*Note: The default is the Current Month and Year.*

**Year**

**3** Type in the **Year**.

**Group Range**

**4** Type in the **from Group Number** and press **ENTER**.

(or)

Press the **F2/DBL CLICK** to display list of Groups. Move cursor to highlight **Group** and press **ENTER** to select.

Follow the same steps for the **thru Group Number**.

**5** Press the **F10 Key** (or highlight Run and press ENTER/CLICK, or press ALT-R) to **Generate Report** to the Output Device specified.

*Report Field (Column) Definitions*

• *DATE - each day of the month specified.*

• *CALLS RECEIVED - number of ACD Calls per day for the month distributed to the Groups specified.*

• *CALLS ANSWERED - number of ACD Calls per day for the month answered by Groups specified.*

- *CALLS ABANDONED - number of ACD Calls per day for the month because they were not answered by Agent, the caller hung up, a receptionist answered the call, or an automated system like voice mail handled the call.*
- *CALLS PICKED UP OR DISCONNECTED - calls answered on a station set other than the original station set by the Norstar "Pick-up" feature, or calls disconnected by the Disconnect Routing Command.*
- *CALLS TRANSFERRED - number of ACD Calls transferred per day, for the month, by the TRANSFER TO, GROUP, LINE XFER, LINK XFER, CDR TABLE, or VMAIL XFER Routing Commands.*
- *AVERAGE ANSWERED - average amount of ACD Time a caller waited per day for the month before Agent answered (total time all calls spent in queue divided by total number of answered calls).*
- *AVERAGE ABANDONED - average amount of ACD Time caller waited per day for the month before hanging up (total time all calls spent in queue before being abandoned divided by total number of abandoned calls).*
- *AVERAGE TALK - average amount of ACD Time spent per day for the month conversing with callers (total time divided by number of answered calls).*
- *AVERAGE HOLD - average amount of ACD Time Agents kept callers on hold per day for the month (total time divided by total number of answered calls).*
- *AVERAGE WRAP - average amount of ACD Time Agents spent on wrap-up per day for the month (total time divided by total number of answered calls).*
- *AUTO LOGOUT - number of automatic logouts for Groups per day for the month without the Agent logging out or going unavailable.*
- *SUPERVISOR HELP - number of requests for Supervisor Help from the Groups per day for the month.*
- *INCOMING, OUTGOING, INTERCOM - total number of calls for the system.*

# System Configuration Report

This Report displays all Configuration information to provide:

◗ Analysis tool so Technical Support can quickly understand your system.

◗ Reference tool so you can view the entire setup of your system.

When you display the **System Configuration Report**, you can specify if you want to print out all Category Codes with the Report.

*Note: if you are using thousands of Category Codes, you may not want to print out all of the codes considering the volume.*

◗ Use the Right and Left Arrow keys to move checkmark between YES and NO fields.

```
01/02/99  11:45:03 am          CINPHONY (123456)              7% Disk Full

  Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                    Process Data
                                    Agent Reports
                                    Group Reports
                                    Line Reports
                            System Configuration Report
       Print Category Codes?  NO (J)      YES ( )      Run Report

       Output Device          LPT1                     Exit Report
       File Name




    Press ENTER/CLICK to omit Category Codes when printing Report
```

You will also have to specify the **Output Device/Filename** fields before running (generating) the Report. Refer to **Common Report Parameters** in this Chapter.

# Scheduler

This utility allows you to automatically Generate Reports and perform certain Maintenance operations on a scheduled Date and Time.

*Note:  You can Schedule a maximum of 100 Reports.  Call data is automatically processed prior to report generation for all scheduled Reports.  At the beginning of every hour, ACD checks the Scheduler any runs any Report set for that hour.  If more than 1 Report is set to run for the same time, all are run in alphabetical order.*

In this section steps are provided so you can perform the following tasks:

◗  Access the Scheduler screen and schedule Report to be generated at a later time.

◗  Delete a Schedule.

Follow these steps to access the Scheduler screen and schedule report to be generated at a later time:

**Main Menu**

**1**  On the Main Menu, move cursor to highlight **Reports** and press **ENTER/CLICK** to select.  The Reports Menu will display.

**Reports Menu**

**2**  Move cursor to highlight **Scheduler** and press **ENTER/CLICK** to select.  The Scheduler screen will display:

```
┌─────────────────────────── Scheduler ───────────────────────────┐
│                                                                  │
│  Description    SALES CALLS                                      │
│  Date           MONDAY                              Save         │
│  Time           08:00 AM                                         │
│                                                    Delete        │
│  Schedule Type  AGENT PROFILE                                    │
│  ┌──────────────────────────────┐                  Exit         │
│  │ Date Range      1 WEEK AGO        thru   1 WEEK AGO           │
│  │ Time Range      00:00             thru   24:00               │
│  │ Topic Range                       thru                       │
│  ┌─────────────────────────────────────────────────────────┐   │
│  │ Page Break ?     101          J.              HIGGINS   ↑│   │
│  │ Agent Call Typ   102          G.              CONNOR     │   │
│  │ Report Method    103          M.              JONES      │   │
│  │ Duration Forma   104          Q.              ADAMS      │   │
│  │                  105          E.              MONROE     │   │
│  │ Output Device    106          R.              SANDSTROM  │   │
│  │ File Name        107          P.              GAMBLE     │   │
│  │                  108          R.              FANELSEK   │   │
│  │                  109          T.              PRATT      │   │
│  │ Next Run Date    9999         TEST            AGENT     ↓│   │
│  └─────────────────────────────────────────────────────────┘   │
│                                                                  │
│ Cursor keys scroll, <ENTER> selects and <ESC> exits choice menu │
└──────────────────────────────────────────────────────────────────┘
```

**Description**

**3**  Type in the **Name** (up to 25 alphanumeric characters) you want for the Report to be generated, or press **F2/DBL CLICK**, highlight **Report,** and press **ENTER/CLICK** to select.  Highlight Date field.

*Note: The Description is used to recall the schedule.  It does not serve as the Report Name.*

**Date**

**4**  Press **F2/DBL CLICK** to display list of days of the week, and other time periods.  Move cursor to highlight **Date** and press **ENTER/CLICK** to select.  Highlight Time field.

**Time**

**5**  Press **F2/DBL CLICK** to display list of time (hours of the day).  Highlight **Time** and press **ENTER/CLICK** to select.  Highlight Schedule Type field.

**Schedule Type**

**6**  Press **F2/DBL CLICK** to display list of Reports.  Highlight **Report** and press **ENTER/CLICK** to select.  The **Report Parameters**, default or changed, will display when the Report Name displays.

**7**  If you want to change the parameters displaying, use the arrow keys to move cursor to each field.  Refer to the Report generation Chapter for this Report to change the field information in the same manner.

**Save Schedule**

**8**  Press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to Save this Schedule (Record) and generate the Report on the Date and Time specified.

Follow these steps to delete a Schedule (Record):

**1**  Make sure Schedule you want to delete is displaying.

**2**  **P**ress the **ALT-D Keys** simultaneously (or highlight Delete and press ENTER/CLICK), select YES to confirm deletion, and the record will be deleted from the database.

*Note: You can also delay a Schedule by:*

- *Make sure Scheduled Report is displaying.*

- *Move the cursor to highlight the **Date** field and press the **F2 Key** to display list of Dates.*

- *Move cursor to highlight **NO EXECUTE** and press **ENTER**.  The report will not run until you return to this Schedule and change the Date field choice.*

# Report/File Maintenance

This utility allows you to perform the following tasks on a Report previously generated and saved to a File (as Output File), a saved Export File, or a saved Recorded Announcement:

◗ Copy Report/File to Drive A:

◗ Move Report/File to Drive A:

◗ View Report on Screen

◗ Print Report

◗ Delete Report/File

In this section steps are provided so you can perform the following tasks:

◗ Access the Report/File Maintenance screen and select Report or File.

◗ Copy Report/File to Drive A:

◗ Move Report/File to Drive A:

◗ View Report.

◗ Print Report.

◗ Delete Report/File.

Follow these steps to access the Report/File Maintenance screen and select Report or File:

**Main Menu**

**1** On the Main Menu, highlight **Reports** and press **ENTER/CLICK** to select. The Reports Menu will display.

**Reports Menu**

**2** Highlight **Report/File Maintenance** and press **ENTER/CLICK** to select. The Report/File Maintenance screen will display:

```
01/02/99  11:46:30 am          CINPHONY (123456)            7% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell

                                   Process Data
                                   Agent Reports
                                   Group Reports
                              Report/File Maintenance
                                                            Print Report

             Report/File Name:                              Exit


             Copy to Drive A:      View Report

             Move to Drive A:      Delete File/Report




   Press F2/DBL CLICK, highlight Report, and press ENTER/CLICK to select
```

**Report Name**

**3** Press **F2/DBL CLICK** to display list of Reports (.RPT or .HTM extension), Export Files (.EXP extension), and Announcement Files (ANNCE0xx.DAT) that can be backed up to floppy disks using this feature. Refer to the Maintenance chapter, Export Data Files section for directions on generating Export Files.

*Notes: A Report generated to HTML (.HTM extension) can only be deleted in Report/File Maintenance. Exported Files cannot be viewed.*

**4** Highlight **Report, Export File, or Announcement File** and press **ENTER/CLICK** to select.

Follow these steps to copy this Report or Export File to Drive A:

**1** Make sure a properly formatted diskette is in Drive A:

**2** Highlight the Copy button and press **ENTER/CLICK**  (or press ALT-C) . The Report or Export File is copied to the diskette.  You may have to use several diskettes depending on the size of the Reports or Files.

Follow these steps to move the Report or Export File to Drive A:

**1** Make sure a properly formatted diskette is in Drive A:

**2** Highlight the **Move** button and press **ENTER/CLICK** (or press ALT-M).  The Report or Exported File is moved to the diskette.  The Report or Files no longer resides on the hard disk.  You may have to use several diskettes depending on the size of the Reports or Export Files.

Follow this step to view the Report on the screen:

**1** Highlight the **View** button and press **ENTER/CLICK** to select (or press ALT-V).  In a few moments, the Report will display on the screen.

To move around Report on screen, use the following keys:

TAB, SHIFT-TAB - moves the cursor right and left on screen.

END, END - moves the cursor to end and beginning of Report.

ARROW KEYS - moves cursor in direction of Arrow key.

CTRL-HOME, CTRL-END - moves cursor to beginning and end of Report row.

Follow this step to print the Report:

**1** Highlight the **Print**  button and press **ENTER/CLICK** (or press ALT-P).  The Report will print to the parallel printer port specified on Printer Configuration screen.

Follow this step to delete the Report (.RPT or .HTM) or Announcement File:

**1** Highlight **Delete**  button and press **ENTER/CLICK** (or press ALT-D).   The Report or Announcement File will be deleted from the database.

# Chapter 6: Maintenance

# Introduction

The Maintenance Menu allows you to manage call data in the following ways:

◗ **Archive Data** - copy call data to diskettes for backup or later restoration.

◗ **Purge Data** - delete call data from database.

◗ **Archive and Purge Data** - copy call data to diskettes and delete call data from database.

◗ **Export Data** - create quote-delimited export files for use in other database packages.  This is available for only for CINPHONY I & II Levels.

◗ **Restore Archived Data** - copy previously archived data from diskettes back into database.

◗ **Recorded Calls** - view the Agent ID, Call Number, Date, and Time for each Recorded Call, or Delete the Agent Recorded Call (row).

◗ **Data Management Parameters** - specify the hour in day that call data is automatically processed and purged; and, specify, the data storage period for the length of time you want to retain call data before it is automatically purged.

# Process Data

Before data can be Archived or Purged, this data must be Processed to update the database.

Follow these steps to access the Reports Menu and Process Data:

**Main Menu**

**1**  On the **Main Menu**, highlight **Reports**  and the menu will display.

**Reports Menu**

**2**  On the **Reports Menu**, highlight **Process Data** and press **ENTER** to select.  The Process Data screen will display.

```
01/02/99  11:33:14 am          CINPHONY (123456)          7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                  Process Data
                                  Agent Reports
                                  Group Reports
                                  Line Reports
                                ┌─ Process Data ──┐
                                                     Process

            Last Database Updated:   12/08/98 09:01 am
                                                     Exit




   Press ENTER/CLICK to Process Data (F10 or Alt P also processes)
```

**3**  Highlight the **Process** button and press **ENTER/CLICK**  to select.  (You can also press the F10 key or the ALT-P keys to process).  You will receive a message: **Processing Data - X% complete**.  After 100% complete, you can work with the Data.

# Archive Data

In this section steps are provided so you can  access the Archive Data screen and copy processed call data from database to diskettes.   Make sure data is processed before archiving.

Follow these steps to access the Archive Data screen and copy processed call data from database to diskettes:

**Main Menu**

**1**   On the **Main Menu**, highlight  **Maintenance** to display menu.

**Maintenance Menu**

**2**   Highlight **Archive Data** and press **ENTER/CLICK** to select.  The Archive Data screen will display.

```
01/02/99  11:47:12 am        CINPHONY (123456)            7% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell

                                        Archive Data
                                        Purge Data
                                        Archive and Purge Data
                                        Export Data

                        ┌─────── Archive Data ───────┐
                                                          Archive
                                                          
        Last Archive Date :  ┌──────────────────┐        Exit
                             └──────────────────┘
                             
        Date Range        :   12/01/98 thru  01/01/99


Press ENTER/CLICK to start archiving CINPHONY call data (Alt A also archives)
```

**Date Range**

**3**   Type in a **From Date** using the format MM/DD/YY.

**4**   Type in a **Thru Date** using the format MM/DD/YY.

*Note:  If Date Range is left blank, the default range will be 1/1/80 through 12/31/79 (January 1, 1980 through December 31, 2079).*

*From/Thru Rules:*

- *If From and Thru range fields are left blank, all data in entire database is archived.*
- *If From range field is completed and Thru range field is left blank, all data is archived from specified start to end of database.*
- *If Thru range field is completed and From range field is left blank, all data is archived from beginning of database to specified end.*
- *To archive one Date of data, the Date must display in both the From and Thru fields.*

**Archive**

**5**   Press the **F10 Key** (or highlight Archive and press ENTER/CLICK, or press ALT-A) to Archive the specified data.  If you want to abort an Archive, press **ESC** during the Archive.

ACD will prompt you to insert **ARCHIVE Disk #1**.  ACD will indicate how many records are being copied to the diskette, and will also prompt you to insert more diskettes if necessary.  When all data is Archived, CINPHONY will display a message.

*Note:* *It is best to use a properly formatted high density diskette; however, the Archive utility will format the disk automatically if it is unformatted.  It is also a good idea to label the disk(s) to indicate the range of data.*

# Purge Data

In this section steps are provided so you can access the Purge Data screen and delete data from database.  Data purged is unrecoverable unless it was previously archived.

> *Note:  If you want to automatically Purge on a daily basis, you can utilize Data Management Parameters.  See Maintenance Menu, this Chapter.*

Follow these steps to access the Purge Data screen and delete this data from database:

**Main Menu**

**1**   On the **Main Menu**, highlight **Maintenance** to display menu.

**Maintenance Menu**

**2**   Highlight **Purge Data** and press **ENTER/CLICK** to select.  The Purge Data screen will display.

```
 01/02/99  11:47:42 am        CINPHONY (123456)          7% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell
                                          ┌──────────────────────────┐
                                          │ Archive Data             │
                                          │ Purge Data               │
                                          │ Archive and Purge Data   │
                                          │ Export Data              │
                        ┌──── Purge Data ─────┐
                        │                 ┌─────────────────┐
                        │                 │     Purge       │
                        │ Last Purge Date │                 │
                        │                 │     Exit        │ ters
                        │                 └─────────────────┘
                        │ Date Range :   12/01/98 thru 01/01/99
                        └──────────────────────────────────────┘



 Type in Thru Date using the format MM/DD/YY
```

**Date Range**

**3**   Type in a **From Date** using the format MM/DD/YY.

**4**   Type in a **Thru Date** using the format MM/DD/YY.

> *Note:  If Date Range is left blank, the default range will be 1/1/80 through 12/31/79 (January 1, 1980 through December 31, 2079).*

> *From/Thru Rules:*

- *If From and Thru range fields are left blank, all data in entire database is purged.*

- *If From range field is completed and Thru range field is left blank, all data is purged from specified start to end of database.*

- *If Thru range field is completed and From range field is left blank, all data is purged from beginning of database to specified end.*

- *To purge one Date of data, the Date must display in both the From and Thru fields.*

**Purge**

**5**   Press the **F10 Key** (or highlight Purge and press ENTER/CLICK, or press ALT-P) to Purge the specified data.  ACD displays a message when Purge is complete.

# Archive and Purge Data

In this section steps are provided so you can access the Archive and Purge Data screen and copy processed call data from database to diskettes while deleting this data from database.

Follow these steps to access the Archive and Purge Data screen and copy processed call data from database to diskettes while deleting this data from database:

**Main Menu**

**1** On the **Main Menu**, highlight **Maintenance** to display menu.

**Maintenance Menu**

**2** Highlight **Archive and Purge Data** and press **ENTER/CLICK** to select.  The Archive and Purge Data screen will display.

```
01/02/99  11:48:10 am        CINPHONY (123456)           7% Disk Full

   Status   Configuration   Reports   Maintenance   ACD Control   DOS-Shell

                                              Archive Data
                                              Purge Data
                                              Archive and Purge Data
                                              Export Data
                          Archive and Purge

                                                  Archive & Purge

        Last Archive Date:
        Last Purge Date  :                        Exit


        Date Range: 12/01/98  thru  01/01/99




 Press ENTER/CLICK and then confirm the archiving and purging of data
```

**Date Range**

**3** Type in a **From Date** using the format MM/DD/YY.  Press **ENTER** to move cursor to Thru Date field.

**4** Type in a **Thru Date** using the format MM/DD/YY.

*Note:  If Date Range is left blank, the default range will be 1/1/80 through 12/31/79 (January 1, 1980 through December 31, 2079).*

*From/Thru Rules:*

• *If From and Thru range fields are left blank, all data in entire database is archived and purged.*

• *If From range field is completed and Thru range field is left blank, all data is archived and purged from specified start to end of database.*

• *If Thru range field is completed and From range field is left blank, all data is archived and purged from beginning of database to specified end.*

• *To archive and purge one Date of data, the Date must display in both the From and Thru fields.*

**Archive and Purge**

**5** Press the **F10 Key** (or highlight Archive and press ENTER/CLICK, or press ALT-A) to Archive and Purge the specified data.  If you want to abort an Archive and Purge, press **ESC** during the Archive and Purge.

ACD will prompt you to insert **ARCHIVE Disk #1**.  ACD will indicate how many records are being copied to the diskette, and will also prompt you to insert more diskettes if necessary.   After archiving calls within the specified range to diskette, the same calls within the range will be deleted. When all data is Archived and Purged, ACD will display a message.

*Note: It is best to use a properly formatted high density diskette; however, the Archive utility will automatically format the disk if it is unformatted.*

]

# Export Data

Export Data is only available for CINPHONY Levels I & II.

In this section steps are provided so you can perform the following task:

◗ Access the Export Data screen and create quote-delimited export files.

*Notes: Make sure data is processed before exporting.*

*When Data is exported, you will create an Export File with a .EXP extension. This File is automatically listed on the Report/File Maintenance. There you can Copy or Move the File to A: Drive (disks). The Export files contain processed call information on which reports are run from the ACD call database. These files are: CALL.EXP, AGENT.EXP, BUSY.EXP, CATEG.EXP. Refer to Appendix 3: Export Data Record Formats for detailed information on these files.*

Follow these steps to access the Export Data screen from the Main Menu and create export files:

**Main Menu**

**1** On the **Main Menu**, highlight **Maintenance** to display the menu.

**Maintenance Menu**

**2** Highlight **Export Data** and press **ENTER/CLICK** to select. The Export Data screen will display.

```
01/02/99  11:48:54 am        CINPHONY (123456)              7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                             Archive Data
                                             Purge Data
                                             Archive and Purge Data
                                             Export Data

                                             Restore Archived Data
                            Export Data
         Date Range    12/01/98 thru 01/01/99      Export Data
         Date Format   MM/DD/YY
                                                    Exit
         Time Range    00:00 thru 24:00
         Time Format   HH:MM AM/PM




   Press F2/DBL CLICK, highlight Date Format, and press ENTER/CLICK to select
```

**Date Range**

**3** Type in a **From Date** using the format MM/DD/YY. Press **ENTER** to move cursor to Thru Date field.

**4** Type in a **Thru Date** using the format MM/DD/YY.

**Date Format**  (format output in the Export files)

**5** Press **F2/DBL CLICK**, highlight the **Date Format**, and press **ENTER/CLICK** to select.

*Date Formats include:*

- *MM/DD     (10/21)*
- *DD/MM     (21/10)*
- *DD MMM    (21 OCT)*
- *MMM DD    (OCT 21)*
- *MM/DD/YY  (10/21/99)*

- *DD/MM/YY  (21/10/99)*
- *YY/MM/DD  (99/10/21)*

**Time Range**

**6**  Type in the **From Time** using the format HH:MM (e.g., 08:30).  Press **ENTER** to move cursor to **Thru Time** field.

**7**  Type in the **Thru Time** using the format HH:MM (e.g., 05:30).  Press **ENTER** to move cursor to Time Format field.

**Time Format**  (format output in the Export files)

**8**  Press  **F2/DBL CLICK**, highlight **Time Format**, and press **ENTER/CLICK** to select.

*Time Formats include:*

- *HH:MM   (10:20)*
- *HH:MMA/P    (10:20A)*
- *HH:MM AM/PM     (10:20AM)*

*From/Thru Rules:*

- *If From and Thru range fields are left blank, all data in entire database is exported.*
- *If From range field is completed and Thru range field is left blank, all data is exported from specified start to end of database.*
- *If Thru range field is completed and From range field is left blank, all data is exported from beginning of database to specified end.*
- *To purge one Date of data, the Date must display in both the From and Thru fields.*

**Export**

**9**  Press the **F10 Key** (or highlight Export and press ENTER/CLICK, or press ALT-E) to Export the specified data.

*Note:  4 Export files will be created: agent.exp, call.exp, busy.exp, and categ.exp**.*

# Restore Archived Data

In this section steps are provided so you can perform the following task:

◗ Access the Restore Archived Data screen and copy data from diskettes back into the database.

Follow these steps to access the Restore Archived Data screen from the Main Menu and copy data from diskette back into database:

**Main Menu**

**1** On the **Main Menu**, highlight **Maintenance** to display menu.

**Maintenance Menu**

**2** Move cursor to highlight **Restore Archived Data** and press **ENTER/CLICK** to select. A message window will display.

```
01/02/99  11:49:13 am        CINPHONY (123456)           7% Disk Full

  Status   Configuration    Reports   Maintenance   ACD Control   DOS-Shell

                                              Archive Data

              Please Insert Disk 1 of the Archive Set
                       Press <ESC> to Quit
                     Press <ENTER> to Continue




 Press ENTER/CLICK and then confirm the restoring of archived data
```

**3** Insert **ARCHIVE DISK #1** into disk drive and press **ENTER**. Press **F10** (or ALT-R) to start Restore. If more than one disk was used for Archiving, ACD will prompt you to insert the next disks in sequential order. When the Restore is complete, the Maintenance Menu will display.

# Recorded Calls

In this section steps are provided so you can perform the following task:

◗ Access the Recorded Call screen and view list of Recorded Calls.

◗ Delete a Recorded Call.

Follow these steps to access the Recorded Call screen from the Main Menu and view list of Recorded Calls:

**Main Menu**

**1** On the **Main Menu**, highlight **Maintenance** to display menu.

**Maintenance Menu**

**2** Highlight **Recorded Calls** and press **ENTER/CLICK** to select. The Recorded Calls screen will display.

```
01/02/99  11:49:37 am          CINPHONY (123456)          7% Disk Full

    Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell
                                                ┌────────────────┐
                                                │ Archive Data   │
                                                │ Purge Data     │
                        ┌─── Recorded Calls Maintenance ───┐
                        │                                  │   Delete
                        │ ┌────────┬───────────┬──────┬──────┐ │
                        │ │Agent ID│Call Number│ Date │ Time │ │   Exit
                        │ │        │           │      │      │ │
                        │ │        │           │      │      │ │
                        │ │        │           │      │      │ │
                        │ │        │           │      │      │ │
                        │ │        │           │      │      │ │
                        │ │        │           │      │      │ │
                        │ └────────┴───────────┴──────┴──────┘ │

Agent who has recorded a call
```

**3** Use the cursor keys, displayed at bottom of screen, to view the list of Recorded Calls.

Follow this step to delete a Recorded Call from database:

**1** Move cursor to highlight **Recorded Call Number**. Press the **ALT-D Keys** simultaneously to delete the Recorded Call (row).

*Note: Recorded Calls use up a lot of disk space; therefore, it is best to periodically clear old calls to free up space.*

# Data Management Parameters

There is are 2 fields to complete for Data Management Parameters:

◗ Daily Auto Purge/Process Time

◗ Data Storage Period

In this section steps are provided so you can perform the following tasks:

◗ Access the Data Management Parameters screen

◗ Select a Time to Daily Auto Purge/Process.

◗ Specify how many days for the Data Storage Period

Follow these steps to access the Data Management Parameters screen from the Main Menu:

**Main Menu**

**1** On the **Main Menu**, highlight **Maintenance** to display the menu.

**2** Highlight **Data Management Parameters** and press **ENTER/CLICK** to select.  The Data Management Parameters screen will display.

```
01/02/99  11:49:46 am          CINPHONY (123456)              7% Disk Full

    Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell

                                              Archive Data
                                              Purge Data
                                              Archive and Purge Data
                                              Export Data

                    ┌──────── Data Management Parameters ────────┐ a
                    │                                            │
                    │  Daily Auto Purge/Process Time  NO EXECUTE    Save  │
                    │                                            │ ters
                    │  Data Storage Period            100 days     Exit  │
                    │                                            │
                    └────────────────────────────────────────────┘

    Press F2/DBL CLICK to select time to purge old data and process current data
```

Follow these steps to select a Time to Daily Auto Purge/Process:

**1** Highlight **Daily Auto Purge/Process** field.   Press **F2/DBL CLICK**, highlight **Time**, and press **ENTER/CLICK** to select.  At this time ACD will automatically purge call data older than the specified storage period and process current call data on a daily basis.

The **Time** that you select for data to automatically be purged on a daily basis, is also the same Time that data will automatically be processed.  However, Purge is dependent on how many days are specified for the Data Storage Period.  For example, the Data Storage Period is preset to 100 days.  This means that all call data that has remained in the database for more than 100 days, will automatically be purged at the Time specified.

*Notes: The default time is NO EXECUTE if you do not want to automate Purge/Process to run daily.  If you set a daily time for example Midnight, every night at 12:00 am  the call data received for that day is processed.  Once data is processed it can be reported and/or purged.  If you want to report on or purge up-to-the-minute call data, you can select Process Data on the Reports Menu and perform a manual*

*process and/or purge.  You can also use Scheduler, to schedule a Purge or Process Data at other intervals than daily.*

*If call data is manually purged (Reports Menu) during the 100 day period for example, the period starts counting toward 100 days from the date of the last Purge.  The following example provides approximations to help you determine the Data Storage Period for your system.*

***Example:*** *approximately 3600 calls will use up approximately 1 megabyte of hard disk space; therefore, if you have 40 megabytes of hard disk space free, it will take approximately 136,000 calls to fill up your hard disk.  If you process 3,600 calls per day, you are using up 1 megabyte of hard disk storage per day; therefore, in 40 days you hard disk will fill up.  For this example, it would be best to set the Data Storage Period to 30 days to compensate for approximations.  The maximum you can set the Data Storage Period is 999 days.*

**Data Storage Period**

**3** Type in up to **3 numeric characters** (range 1-999) for Data Storage Period.

**4** When all screen information is complete, press the **F10 Key** (or highlight Save and press ENTER/CLICK, or press ALT-S) to **Save** this information.

# Chapter 7: ACD Control

```
01/02/99  11:19:14 am          CINPHONY (123456)            7% Disk Full

   Status    Configuration    Reports    Maintenance    ACD Control    DOS-Shell














   Press ENTER/CLICK to display Group Status Screen
```

# ACD Control

The ACD Control option will display on the Main Menu.

The  ACD Control screen allows you to perform the following operations:

◗ **Activate** - if you have selected Deactivate to stop Call Processing, you can select Activate to restart Call Processing.  The Main Menu will then display so you can continue to use ACD.

◗ **Deactivate** - if you want to stop Call Processing to execute an Add-On install, an Upgrade install, an Update install, or shut the system down, you will need to select this operation.

◗ **Execute** - this operation is used to install the Add-Ons:.  When you select Execute, the software will automatically load.  There are 3 types of installs that can be executed:

• Add-On (install Automated Attendant, Wallboard, Status Display for Windows (versions 3.1 or 95/NT), and/or Voice Port Activation)

• Upgrade (from one ACD level to another - PRELUDE, CINPHONY I, and CINPHONY II)

• Update (from one ACD version to another)

Refer to the **Norstar PRELUDE and CINPHONY ACD Installation Guide** for directions to perform these installs.

◗ **Off-Line** - this operation starts ACD without enabling Call Processing.  This allows you to perform the following without being connected to the KSU:

• Generate Reports

• Modify Scheduler

• Perform any function not requiring active Call Processing

◗ **Return** - this option is used to exit the ACD Control screen and return to the Main Menu.

◗ **Shutdown** - if you select this option, all running programs on the system will stop and allow you to power off the Application Module.  This would be necessary, for example, if you wanted to move the Applications Module or install a DVC or MS-BIC.

## Activate

Follow these steps to Activate Call Processing that was previously deactivated:

**1** Display the ACD Control screen.

**2** Highlight **Activate** and press **ENTER**. Call Processing will start and you will be returned to the Main Menu.

*Note: If you have selected Deactivate and then Execute to perform an install, Call Processing will automatically resume once the install completes. If you have selected Deactivate and then Shutdown, Call Processing will automatically resume when you restart the system.*

## Deactivate

Follow these steps to Deactivate Call Processing:

**1** Display the ACD Control screen.

**2** Highlight **Deactivate** and press **ENTER**. A message will display: "Choosing this option will stop Call Processing. Are you sure you want to do this?"

**3** Highlight **OK** and press **ENTER**. Call Processing will stop, and you will remain at the ACD Control screen where you can select Execute (install software on A: Drive), Activate, and/or Shutdown.

## Execute

Refer to the Norstar PRELUDE and CINPHONY ACD Installation Guide for directions to Execute any of the following installs:

◗ Add-On (Automated Attendant, Wallboard, Status Display for Windows (versions 3.1 or 95/NT), and Voice Port Activation)

◗ Upgrade (upgrade from one level of ACD to the next highest - PRELUDE, CINPHONY I, and CINPHONY II).

◗ Update (update from your current Version of ACD to the next Version).

After you execute the install for the software, you will be returned to the Main Menu and Call Processing will automatically be activated.

## Off-Line

If Call Processing has been deactivated, you can select Off-Line to use ACD without Call Processing being active. You will then be able to perform the following without being connected to the KSU:

◗ Configure

◗ Generate Reports

◗ Modify Scheduler

◗ Perform any function not requiring active Call processing

Follow these steps to go Off-Line:

**1** Display the ACD Control screen and make sure Call Processing has been deactivated.

**2** Highlight **Off-Line** and press **ENTER**. The Main Menu will display.

## Return

Select Return to exit the ACD Control screen and display the Main Menu. Highlight **Return** and press **ENTER** (or click on Return).

## Shutdown

Shutdown will stop all running programs on the system and allow you to power off the Applications Module.

Follow these steps to Shutdown:

**1** Display the ACD Control screen.

**2** Follow the previous steps to **Deactivate**.

**3** After Call Processing has stopped, highlight **Shutdown** and press **ENTER**. A message will display: "OK closes all running programs and prepares the system for restart. If chosen, wait for shutdown messages. Are you sure you want to do this?"

**4** Highlight **OK** and press **ENTER**. Shutdown will occur for several seconds and the a message will display: "Shutdown has completed. It is now safe to turn off your computer, or restart the system by pressing Ctrl+Alt+Del."

**5** Turn off the Applications Module by unplugging the power cord. Or to restart, press the Ctrl, Alt, and Del keys simultaneously. After restart, you will be returned to the Main Menu.

You may want to shutdown, for example, to move the Applications Module to a different location or install a DVC or MS-BIC.

# Chapter 8: DOS-Shell

```
01/02/99  11:19:14 am          CINPHONY (123456)          7% Disk Full

  Status    Configuration   Reports   Maintenance   ACD Control   DOS-Shell


















Press ENTER/CLICK to display Group Status Screen
```

# DOS-Shell

DOS-Shell will display on the Main Menu.

Follow these steps to select DOS-Shell to exit the Main Menu and display the CINPHONY Directory.

**1** Highlight **DOS-Shell** and press **ENTER**.  The CINPHONY Directory prompt will display - C:\CINPHONY>.  To return to the Main Menu, type in **EXIT** and press **ENTER**.

Call Processing will remain active and you will be able to perform various functions at the CINPHONY Directory.

   ◗ ACD LOGIN (acdlogin.bat)
   ◗ Copy Recorded Announcements to the A: drive
   ◗ Backup Recorded Calls to the A: Drive
   ◗ Perform maintenance operations coordinated by CINTECH Support (e.g., Rebuild Databases, etc.)
   .

# Chapter 9: Appendices

There are 7 Appendices:

- ❱ Appendix 1: Supervisor and Agent Messages
- ❱ Appendix 2: Troubleshooting
- ❱ Appendix 3: Export Data Record Formats
- ❱ Appendix 4: ACD Agent Login / Logout
- ❱ Appendix 5: Tips and Hints
- ❱ Appendix 6: Virtual Modem
- ❱ Appendix 7: Average & Expected QTime Announcements

# Appendix 1: Supervisor and Agent Messages

The Applications Module and Norstar Station Sets display messages for Supervisors about Agents, Groups, and Lines.

## Supervisor Messages

There are 4 types of Supervisor Messages:

- ❱ WARNING
- ❱ DISPLAY
- ❱ INFORMATION
- ❱ CRITICAL

DN 9999999 Fail

**WARNING**  The extension shown is not responding, and Agent has been automatically logged out.

Grp: DAY route

**WARNING**  Group displaying is now using day routing.

Grp: 99 NTEroute
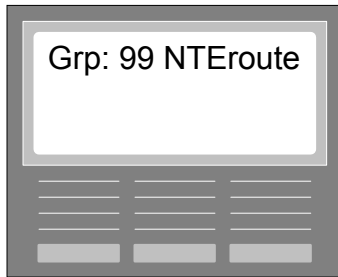
**WARNING**  Group displaying is now using night routing.

Grp: 99 - Grp:99
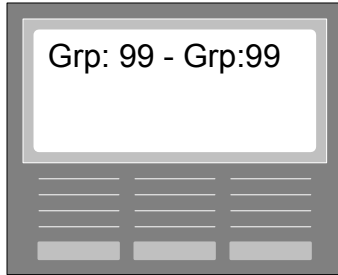
**WARNING**  Group overflow is occurring from - to the groups.

Grp: 99 NoAgents
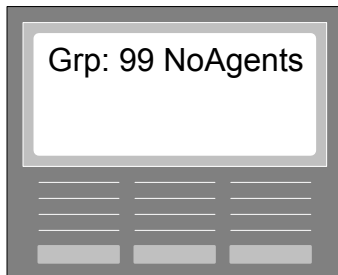
**WARNING**  All Agents in group have logged out.

Invalid sprv ID

**DISPLAY**  Wrong supervisor ID was entered during registration.

Log out first

**DISPLAY**  Station Set already has Agent logged in.

```
Announcement: 00

BKSP    OK     EXIT
```

**DISPLAY** Type in Announcement number to be played or recorded.

```
Information Msg?

YES    NO     EXIT
```

**INFORMATION** YES: CINPHONY displays message for Supervisor.

```
J. Smith    Login
```

**INFORMATION** Agent displaying has just logged in to ACD.

```
J. Smith    Logout
```

**INFORMATION** Agent displaying has just logged out of ACD.

```
J. Smith    No ans
```

**INFORMATION** Agent displaying did not answer last call has just logged out of ACD.

J. Smith      Help
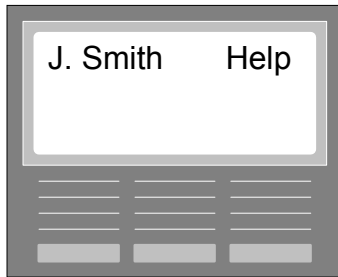
**CRITICAL**  Agent displaying requests Supervisor Help.

## Agent Messages

All Agent Messages received on Station Set are considered Display Messages.

Available

UNAVAILABLE Key has been pressed; CINPHONY will now route calls to Agent.

Cat:

BKSP    OK    EXIT

Categorize the current call by typing in code to continue.

Dial supervisor

HELP Key was pressed while not on a call.  Dial Supervisor's extension for help.

End call first

Could not perform certain operation while on a call.  Finish call and try again.

Assigned Groups

EDIT    OK    EXIT

Agent is authorized for more than 1 Group.  Select all Groups you want to login.

Invalid agent ID

An invalid ID was entered.  Press LOGIN Key and start over.

Invalid password

An invalid password was entered.  Press LOGIN Key and start over.

Log in first

A operation was requested requiring a login.  Press LOGIN Key and start over.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ 9999 Logged in│  │
│  │               │  │
│  │               │  │
│  └───────────────┘  │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ▭▭▭  ▭▭▭  ▭▭▭      │
└─────────────────────┘
```
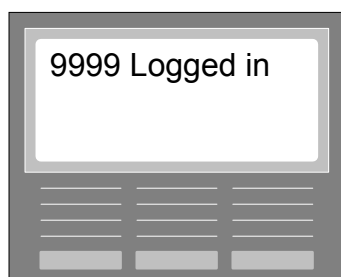
Agent login is being confirmed by ACD.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ Logged out    │  │
│  │               │  │
│  │               │  │
│  └───────────────┘  │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ▭▭▭  ▭▭▭  ▭▭▭      │
└─────────────────────┘
```

Agent Logout is being confirmed by ACD.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ Login aborted │  │
│  │               │  │
│  │               │  │
│  └───────────────┘  │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ▭▭▭  ▭▭▭  ▭▭▭      │
└─────────────────────┘
```
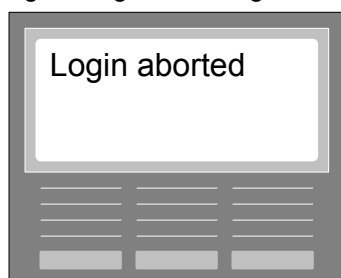
EXIT was pressed during Login process.  Press LOGIN Key and start over.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ Login denied  │  │
│  │               │  │
│  │               │  │
│  └───────────────┘  │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ▭▭▭  ▭▭▭  ▭▭▭      │
└─────────────────────┘
```
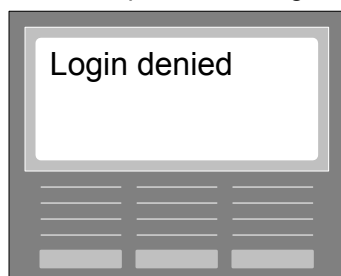
Agent is already logged in using the same ID just entered.  Logout and then Login.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ Login:        │  │
│  │               │  │
│  │ BKSP  OK  EXIT│  │
│  └───────────────┘  │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ════ ════ ════     │
│  ▭▭▭  ▭▭▭  ▭▭▭      │
└─────────────────────┘
```

LOGIN Key was pressed; ACD is now asking for Agent ID.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ Logins exceeded│  │
│  │               │  │
│  │               │  │
│  └───────────────┘  │
│  ═══  ═══  ═══       │
│  ═══  ═══  ═══       │
│  ▭▭  ▭▭  ▭▭        │
└─────────────────────┘
```
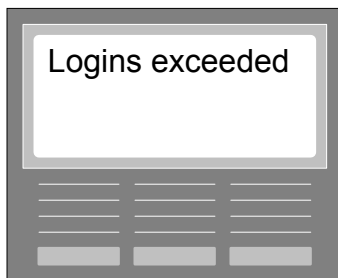
The maximum number of Agents have been logged in for ACD.  Wait for an Agent to logout before logging in.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ Logout Aborted │  │
│  │               │  │
│  │               │  │
│  └───────────────┘  │
│  ═══  ═══  ═══       │
│  ═══  ═══  ═══       │
│  ▭▭  ▭▭  ▭▭        │
└─────────────────────┘
```

EXIT Key was pressed after ACD requested confirmation of a logout command.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ Logout?        │  │
│  │               │  │
│  │ BKSP  OK   EXIT│  │
│  └───────────────┘  │
│  ═══  ═══  ═══       │
│  ═══  ═══  ═══       │
│  ▭▭  ▭▭  ▭▭        │
└─────────────────────┘
```
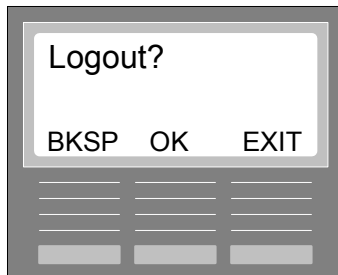
The LOGIN Key was pressed while Agent is logged in.  ACD is making sure that you wish to logout.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ Logout first   │  │
│  │               │  │
│  │               │  │
│  └───────────────┘  │
│  ═══  ═══  ═══       │
│  ═══  ═══  ═══       │
│  ▭▭  ▭▭  ▭▭        │
└─────────────────────┘
```

Agent must be logged out before performing the operation requested.

```
┌─────────────────────┐
│  ┌───────────────┐  │
│  │ No active call │  │
│  │               │  │
│  │               │  │
│  └───────────────┘  │
│  ═══  ═══  ═══       │
│  ═══  ═══  ═══       │
│  ▭▭  ▭▭  ▭▭        │
└─────────────────────┘
```

Agent must be on a call before ACD can start recording a conversation.

```
No supervisor
```

There is no Supervisor registered for the Agent's Group.

```
Pwd: 99999999

BKSP    OK    EXIT
```

An ID was entered as part of Login process.  ACD now is asking for the password before authorizing Login.

```
Record on
```

The RECORD CALL was pressed; ACD is now recording current call.  Level II only.

```
Record off
```

The RECORD CALL Key was pressed during the recording of a call.  ACD will now stop recording and store call to disk.

```
Record unavail
```

The device to record call is presently unavailable.  Try again.

Unavailable

The UNAVAILABLE Key was pressed while Agent is available. Agent is still logged in; however, ACD will not route calls to station set unless the UNAVAILABLE Key is pressed again.

xxxxxxxx      99:99

A call has been sent to Agent's station set. This display shows the name of the Group for the call and the amount of time caller has waited.

xxxxxxxx      +99:99

A call has overflowed from one Group and is being sent to this station set. This display shows the name of the group for the call, a + symbol designated Overflow Call, and the amount of time caller has waited.

# Appendix 2: Troubleshooting

The following are common problems that may occur while using ACD. If the solution provided does not solve the problem, call CINTECH Support.

**Problem:**

ACD locks during start-up.

**Possible Solutions:**

Check Applications Module connections (power switches, cords, and outlets).

Listen to system cooling fan. If fan is not running and incoming power is good, a hardware problem may exist. Call Technical Support.

Check for error messages on ACD screens, and, if displayed, write them down for your dealer's reference.

**Problem:**

Agents are not receiving calls.

**Possible Solutions:**

Try to log in at station set. If LOGIN or END CALL message displays, ACD is operating correctly. Check to see if the Incoming Lines are working correctly. If Feature 9nn or Feature Inactive displays on the station set, ACD has stopped running. Warm Boot (CTRL-ALT-DEL) the system.

Try to make an Outgoing call, and, if you cannot, this means that either the Norstar or Lines are not working.

Try to call a ACD Line while watching the Status Display Screens. If calls are queued while an Agent is available, have Agents log out and then log in. If this does not work, call Technical Support.

**Problem:**

Applications Module Time is incorrect which can cause the Day to Night, or Night to Day, routing step change to be delayed.

**Possible Solution:**

Time and date for ACD are taken from Norstar during boot up. Check station set and see if time is correct. If not, the Norstar's time and date must be corrected.

**Problem:**

Voice port status is INITING or DISABLED.

**Solution:**

If port fails to respond to INITING after 5 tries, the status will display as DISABLED. The port will become disabled pending next reboot or voice port verification. Call Technical Support.

**Problem:**

Receiving "Invalid product ID", "Invalid Verification Key", or "Security Key Not Found" error message when turning ACD or rebooting.

**Solution:**

The ACD Security Key is missing or there is a bad connection. Check the Security Key connector attaching parallel printer cable to Applications Module's printer port. If missing, or if it is connected but does not respond, call Technical Support immediately.

**Problem**

When Configuration changes are made, some Agents may get logged out. Reasons: An Agent is deleted from Configuration. An Agent ID has been changed. Agent was assigned to a Group that has been deleted. An Agent has been removed from an Group's Agent List.

**Solution**

Re-configure the Agent and login; or, if Agent still exists, login Agent.

**Problem**

If you have been using ACD and then receive a message "Invalid Verification Key".

**Solution:**

The ACD Security Key, or port to which it is connected has a problem.  Call Technical Support immediately.  They will provide a temporary Verification Key and resolve the Security Key problem.

# Appendix 3: Export Data Record Formats

A Comma Delimited ASCII File displays data fields between quotation marks and separated by commas. See example below each Table.

On the following pages there are 4 Data Export Records:

◗ Agent Records

◗ Categorization Record

◗ Busy Period Record

◗ Call Record

For each of these Record Tables there are 3 columns:

- Field Number

- Field Name

- Notes: length of specified fields or field specifications

These tables reflect the formats for CINPHONY Level II.  Differences for PRELUDE and CINPHONY II will be noted.

# Agent Record

Each Record corresponds to a single login/logout period for a single Agent.

| Field Number | Field Name | Notes |
|---|---|---|
| 1 | "AGENT" | Indicates an Agent Record |
| 2 | Agent ID | 2 to 4 numeric characters |
| 3 | Agent First Name | 1 to 15 alphanumeric characters |
| 4 | Agent Last Name | 1 to 15 alphanumeric characters |
| 5 | Login Date | Date in user-selected format |
| 6 | Login Time | Time in user-selected format |
| 7 | Logout Type | Indicates how the login/logout period ended: "ACTIVE" (logged in at period's end) "AUTO" (logged out by ACD) "MANUAL" (logged out normally) |
| 8 | Login Duration | Duration in seconds |
| 9 | Available Duration | Duration in seconds |
| 10 | Unavailable Duration | Duration in seconds |
| 11 | Logged Groups | A string of Y/N characters indicating into which Groups the Agent logged. For instance, YNNNYNNNNNNNNNNNNNNNNNNNNN indicates an Agent logged into Groups 1 and 5 (dependent on ACD Level). |

**Example:** "AGENT","1111","JOHN","SMITH", 02/13/95","8:20","ACTIVE","2240","1240","400","YNYNYNNNNNNNYNNNNNNNNNNNN"

*Maximum Groups: PRELUDE - 3, CINPHONY I - 6, CINPHONY II - 80.*

## Categorization Record

Whenever an Agent categorizes a call, a Record is entered here.

| Field Number | Field Name | Notes |
|---|---|---|
| 1 | "CATEGORY" | |
| 2 | Category | 1 to 12 numeric characters |
| 3 | Description | 1 to 30 alphanumeric characters |
| 4 | Date | Date in user-selected format |
| 5 | Time | Time in user-selected format |
| 6 | Agent ID | 2 to 4 numeric characters |
| 7 | Group Number | 1 to 2 numeric characters (1-80 dependent on ACD Level) |

**Example:** "CATEGORY","0001","SUPPORT","02/13/95","8:20:","1111","02"
*Maximum Groups: PRELUDE - 3, CINPHONY I - 6, CINPHONY II - 80.*

## Busy Period Record

Each Record corresponds to an occasion when all Lines assigned to the Group are busy.

| Field Number | Field Name | Notes |
|---|---|---|
| 1 | "BUSY" | |
| 2 | Group Number | 1 to 2 numeric characters (1-80 dependent on CINPHONY Level) |
| 3 | Date | Date in user-selected format |
| 4 | Start Time | Time in user-selected format |
| 5 | Duration | Duration in seconds |

**Example:** "BUSY","02","02/13/95","8:20:","20"
*Maximum Groups: PRELUDE - 3, CINPHONY I - 6, CINPHONY II - 80.*

## Call Record

Each Record corresponds to a Call.

| Field Number | Field Name | Notes |
|---|---|---|
| 1 | "CALL" | Indicates an Agent Record |
| 2 | Date | Date in user-selected format |
| 3 | Line | 1 to 2 numeric characters (1-144) |
| 4 | Time | Time in user-selected format |
| 5 | Agent ID | 2 to 4 numeric characters |
| 6 | Type | Indicates the kind of Call: ABANDONED, ACD, DISCONNECTED, INCOMING, INTERCOM, OUTGOING, or TRANSFERRED. |
| 7 | Group Number (Answer) | The Call was distributed to an Agent in this Group. (1 to 2 numeric characters; 1-80 dependent on ACD Level) |
| 8 | Origination Group | The 1st. Group associated with the Call: answered by ACD on a Line assigned to the Group, or answered outside ACD and transferred to the Group's Transfer DN. (1 to 2 numeric characters; 1-80 dependent on ACD Level). |
| 9 | Duration to Answer | Duration in seconds |
| 10 | Talk Duration | Duration in seconds |
| 11 | Hold Duration | Duration in seconds |
| 12 | Wrap Duration | Duration in seconds |
| 13 | Abandoned Duration | Duration in seconds |
| 14 | Ringing Duration | Duration in seconds |
| 15 | Supervisor Help Count | Numeric characters |
| 16 | Routing Type | Indicates which Routing Table is applied to Call: DAY or NIGHT |
| 17-32 | Routing Step Counts | Each of these 16 Fields is the count of the number of times the Call reached this Step. This can be > 1 if there is a GOTO in the Routing Table. |
| 33 | Originating Number | 0 to 10 numeric characters |
| 34 | Originating Name | 8 alphanumeric characters |
| 35 | Destination Number | 0 to 10 numeric characters |

**Example:**"CALL","03/29/00","13","05:42PM","265","ACD","7","7","74","146","
0","0","0","0","0","DAY","1",1","0","0","0","0","0","0","0","0","0","0","0","0","0","0","7892341234","","8009443901
"

# Appendix 4: ACD Agent Login / Logout

This program allows you to perform the following types of logins and logout at the DOS prompt (CINPHONY Directory):

◗ **Manually Login Agents (or Non-Agents\*)**

- Available and in all Groups
- Available and in specified Groups
- Unavailable and in all Groups
- Unavailable and in specified Groups
- Static Unavailable and in all Groups
- Static Unavailable and in specified Groups

◗ **Manually logout Agents (or Non-Agents\*)**

◗ **Automatically login Agents (or Non-Agents\*) using EXTERNAL.BAT file**

\* *Non-Agent refers to an IVR (Interactive Voice Response) device to act as an Agent handling a call. The IVR is connected to an ATA.*

*Command Line syntax:  [ACDLOGIN] [AGENT ID] [DN] [ALL/GROUP] [A/U/S]*

## Manually Login Agents

Follow these steps to login Agent 0001, in all Groups to which Agent is assigned, and who will be available at the start to take calls:

**1**  **DOS-Shell**  or **Quit** ACD and return to DOS - **C:\CINPHONY>**

**2**  After the CINPHONY Directory DOS prompt, type in **ACDLOGIN**, press the **Spacebar** once, type in **Agent's ID** (or Non-Agent's ID), press the **Spacebar**, type in **Agent's Station Set DN** (or ATA's DN for Non-Agent), press the **Spacebar**, type in the word **ALL** (for all Groups to which Agent is assigned), press the **Spacebar**, and type in the letter **A** (for Available).  Then press **ENTER** to complete login command line.

Example:  C:\CINPHONY>**ACDLOGIN  0001  230  ALL  A**   <ENTER>

Follow these steps to login Agent 0001, in specified Groups (3,4, and 5) to which Agent is assigned, and who will be available at the start to take calls:

**1**  **DOS-Shell** or **Quit** ACD and return to DOS - **C:\CINPHONY>**

**2**  After the CINPHONY Directory, type in **ACDLOGIN**, press the **Spacebar** once, type in **Agent's ID** (or Non-Agent's ID), press the **Spacebar**, type in **Agent's Station Set DN** (or ATA's DN for Non-Agent), press the **Spacebar**, type in **3**, press the **Spacebar**, type in **4**, press the **Spacebar**, type in **5**, press the **Spacebar**, and type in the letter **A** (for Available).  Then press **ENTER** to complete login command line.

Example:  C:\CINPHONY>**ACDLOGIN  0001  230  3  4  5  A**   <ENTER>

Follow these steps to login Agent 0001, in all Groups to which Agent is assigned, and who will be unavailable at the start to take calls:

**1**  **DOS-Shell** or **Quit** ACD and return to DOS - **C:\CINPHONY>**

**2**  After the CINPHONY Directory, type in **ACDLOGIN**, press the **Spacebar** once, type in **Agent's ID** (or Non-Agent's ID), press the **Spacebar**, type in **Agent's Station Set DN** (or ATA's DN for Non-Agent), press the **Spacebar**, type in the word **ALL** (for all Groups to which Agent is assigned), press the **Spacebar**, and type in the letter **U** (for Unavailable).  Then press **ENTER** to complete login command line.

Example:  C:\CINPHONY>**ACDLOGIN  0001  230  ALL  U**   <ENTER>

*Note: To take a call, the Agent will have to go available at the station set.*

Follow these steps to login Agent 0001, in specified Groups (3,4, and 5) to which Agent is assigned, and who will be unavailable at the start to take calls:

**1**  **DOS-Shell** or **Quit** ACD and return to DOS - **C:\CINPHONY>**

**2**  After the CINPHONY Directory, type in **ACDLOGIN**, press the **Spacebar** once, type in **Agent's ID** (or Non-Agent's ID), press the **Spacebar**, type in **Agent's Station Set DN** (or ATA's DN for Non-Agent), press the **Spacebar**, type in **3**, press the **Spacebar**, type in **4**, press the **Spacebar**, type in **5**, press the **Spacebar**, and type in the letter **U** (for Unavailable).  Then press **ENTER** to complete login command line.

Example:  C:\CINPHONY>**ACDLOGIN 0001 230 3 4 5 U**   <ENTER>

*Note: To take calls, the Agent will have to go available at the station set.*

Follow these steps to login Agent 0001, in all Groups to which Agent is assigned, and who will be statically unavailable to take calls:

**1**  **DOS-Shell** or **Quit** ACD and return to DOS - **C:\CINPHONY>**

**2**  After the CINPHONY Directory, type in **ACDLOGIN**, press the **Spacebar** once, type in **Agent's ID** (or Non-Agent's ID), press the **Spacebar**, type in **Agent's Station Set DN** (or ATA's DN for Non-Agent), press the **Spacebar**, type in the word **ALL** (for all Groups to which Agent is assigned), press the **Spacebar**, and type in the letter **S** (for Static Unavailable).  Then press **ENTER** to complete login command line.

Example:  C:\CINPHONY>**ACDLOGIN 0001 230 ALL S**   <ENTER>

*Note: When a call arrives on the Agent's Station Set, the indicator light is the only signal that a call is in queue; however, you can use the ALERT Routing Command as the first step in the Routing Table so that all calls will ring on the station set assigned for the ALERT ring.  This way, Agents can hear the ALERT ring each time a call enters the queue for the Group.*

*To take a call, the Agent must press the Unavailable button; therefore, this button should be programmed.*

Follow these steps to login Agent 0001, in specified Groups (3,4, and 5) to which Agent is assigned, and who will be statically unavailable at the start to take calls:

**1**  **DOS-Shell** or **Quit** ACD and return to DOS - **C:\CINPHONY>**

**2**  After the CINPHONY Directory, type in **ACDLOGIN**, press the **Spacebar** once, type in **Agent's ID** (or Non-Agent's ID), press the **Spacebar**, type in **Agent's Station Set DN** (or ATA's DN for Non-Agent), press the **Spacebar**, type in **3**, press the **Spacebar**, type in **4**, press the **Spacebar**, type in **5**, press the **Spacebar**, and type in the letter **S** (for Static Unavailable).  Then press **ENTER** to complete login command line.

Example:  C:\CINPHONY>**ACDLOGIN 0001 230 3 4 5 S**   <ENTER>

*Note: When a call arrives in the Group, the indicator light is the only signal that a call is in queue; however, you can use the ALERT Routing Command as the first step in the Routing Table so that all calls will ring on the station set assigned for the ALERT ring.  This way, Agents can hear the ALERT ring each time a call enters the queue for the Group.  When Agents, logged in with the "S" parameter, hangs up an ACD Call, they will remain in an unavailable status.*

## Manually Logout Agents

Follow these steps to logout Agent 0001:

**1**  **DOS-Shell** or **Quit** ACD and return to DOS - **C:\CINPHONY>**

**2**  After the CINPHONY Directory, type in **ACDLOGIN**, press the **Spacebar** once, type in **Agent's ID** (or Non-Agent's ID), press the **Spacebar**, type in the letters **LO** (for logout).  Then press **ENTER** to complete logout command line.

Example:  C:\CINPHONY>**ACDLOGIN 0001 LO**   <ENTER>

## Automatically login Agents using EXTERNAL.BAT file

In this exercise, only one example will be used for login; however, if you want to use any other combination of login, refer to the examples provided previously.

Follow these steps to login Agents 0001, 0002, 0003, and  0004, in all Groups to which Agent is assigned, and who will be available at the start to take calls:

**1**  Select **DOS-Shell** from the ACD Main Menu to display the CINPHONY Prompt - **C:\CINPHONY>**

**2**  At this prompt, type in **EDIT**, press the **Spacebar**, type in **EXTERNAL.BAT**, and press **ENTER**.  The external.bat file will display (blank text editor file).  Then type in the following command lines as an example:

**ACDLOGIN  0001  230  ALL  A**

**ACDLOGIN  0002  231  ALL  A**

**ACDLOGIN  0003  232  ALL  A**

**ACDLOGIN  0004  233  ALL  A**

**3**  When completed, **Save** this file.  You will be returned to the CINPHONY Directory prompt.  At this prompt, type in **Exit** to return to the **ACD Main Menu**.

**4**  To automatically login these Agents, select **DOS-Shell** from the ACD Main Menu.  After the CINPHONY Directory Prompt, type in the word **EXTERNAL** and press **ENTER** to login all agents listed.  At this prompt, type in **Exit** to return to the **ACD Main Menu**.

   Example:   C:\CINPHONY>**EXTERNAL**    <ENTER>

If you have any questions concerning ACD Login, call CINTECH Customer Support.

# Appendix 5: Tips and Hints

The following sections comprise this Appendix:

◗  Norstar Time Change

◗  HP LaserJet 6L Printer Driver Installation

## Norstar Time Change

The following directions are only required for Norstar KSU versions prior to the release of the ICS 1.1 (Integrated Communication System) KSUs.

ACD receives its time from the Norstar phone system.  The following provides directions to change the time on the Norstar to correct the ACD system time.  You will need the current **ADMIN Password** for your Norstar.

Changes to Norstar programming are immediate; therefore, be very careful making any changes.  If you are unsure of making these changes, contact your Norstar Administrator or Technician.

Follow these steps:

**1**  Use a Station Set M310 or M324.

**2**  Press the **Feature Key** and then type in **\*\*23646**.  When prompted for a Password, type in **23646** and then press the **OK** softkey.

**3**  After the Password, the **1.SYSTEM SPEED DIAL** screen will display and several **Indicators** will light up at the top of the small button row.  This row could either be at the top of the set or directly under the display's softkeys.  Press the **second key on the right**.

**4**  The Names screen will display.  Press the **second key on the right**.

**5** The Time and Date screen will display.  Press the **top key on the right**.

**6** The Time screen will display.  Press the **CHANGE  softkey**.

**7** The Hour screen will display.  Press the **CHANGE softkey**.

**8** The Hour _____ screen will display.  Type in the **current hour** and then press the **second key on the right**.

**9** The Minutes screen will display.  Press the **CHANGE softkey**.

**10** The Minutes_____ screen will display.  Type in the **current minutes** and then press the **first key on the left**.

**11** Press the **Rls key**.


## HP LaserJet 6L Printer Driver Installation

If you are using the HP LaserJet 6L and you have not installed its Printer Driver and/or displayed its Printer Object on the OS/2 Desktop, you will need to follow the directions provided below.

If you have installed the HP LaserJet 6L Printer Driver and its Printer Object is displaying, you will only need to follow the directions provided in Step 12 in the next section.

Follow these steps if your OS/2 Desktop does not display the HP LaserJet 6L Printer Object and you have not installed LASERJET.HP LaserJet 6L Printer Driver:

**1** In the **OS/2 System -Icon View**, open the **Template Folder**.  The Templates - Icon View will display.

**2** Point to the Printer Template, press and hold down the right Mouse button.

**3** Drag the **Printer Template** to the Desktop and release the right Mouse button.

**4** In the Printer **Name** field, type a name for the Printer (e.g., My-LaserJet 6).

**5** Select a **Port** to which the Printer is connected.

**6** Select **Install new printer driver**.  A window will display a list of the Printer Drivers shipped with OS/2.

**7** Select **Other OS/2 printer driver**.

**8** Insert the diskette containing the Printer Drivers into Drive A.

**9** Select **Refresh**.  The list of Printer Drivers will display.

**10** Use the left Mouse button to select **LASERJET.HP LaserJet 6L**.

**11** Select **Install**.  HP LaserJet 6L will install and its Printer Object will display on the OS/2 Desktop.

**12** Enter PRELUDE or CINPHONY, select Printer on the Configuration Menu, and then configure **HP LaserJet III** that will operate the HP LaserJet 6L model.

Follow these steps if your OS/2 Desktop displays the HP LaserJet 6L Printer Object but the LASERJET.HP LaserJet 6L  Printer Driver has not been installed:


**1** On the OS/2 desktop, point to the **HP LaserJet 6L Printer Object** and click the right Mouse button.

**2** Select **Settings**.

**3** Select the **Printer driver** tab.

**4** Point to one of the **Printer Objects** and click the right Mouse button.

**5** Select **Install new printer driver**.  A window will display a list of the Printer Drivers shipped with OS/2.

**6** Select **Other OS/2 printer driver**.

**7** Insert the diskette containing the Printer Drivers into Drive A.

**8** Select **Refresh**.  The list of Printer Drivers will display.

**9** Use the left Mouse button to select **LASERJET.HP LaserJet 6L**.

**10** Select **Install**.  HP LaserJet 6L will install and its Printer Object will display on the OS/2 Desktop.

**11** Enter PRELUDE or CINPHONY, select Printer on the Configuration Menu, and then configure **HP LaserJet III** that will operate the HP LaserJet 6L model.

# Appendix 6: Virtual Modem

Norstar Applications Modules, based on their production date, may be equipped with an on-board internal modem.  This virtual modem must only be used in conjunction with a CINTECH Support representative for troubleshooting purposes.  Several important internal modem features will be highlighted here but, for detailed directions, please refer to your Norstar Applications Module Installation and Maintenance Manual.

The internal modem utilizes voice channels and a standard Norstar DN to establish the modem connection.  It is important to note, therefore, that when the internal modem is in use, your system's voice announcement capacities may be impacted.

◗ The internal modem is off by default.

◗ A password protected Norstar Feature Code is used to configure and enable/disable the internal modem.

◗ When enabled, the internal modem utilizes 1 voice channel.

◗ When a modem connection is established  3 additional voice channels are utilized  (*i.e., 4 total voice channels in use for the duration of the modem connection*).

Rules for acquiring voice channels:

◗ Available voice channels not utilized by any application (*e.g., ACD, voice mail*) are used first.

◗ If needed, voice channels are then acquired from applications in an equitable fashion.

> *Note:  A standard physical modem can be installed into systems equipped with the internal (virtual) modem.  For directions, please refer to the Norstar Applications Module Installation and Maintenance Manual.*

# Appendix 7: Average & Expected QTime Announcements

## Average QTime Announcement Calculation

ACD calculates the Average Time to Answer statistic for all calls in the Group, rounds up to the next minute, matches this number of minutes to the corresponding minutes set for the second announcement, and then plays the second announcement.  ACD constantly calculates Average Time to Answer to update the second announcement.

## Expected QTime Announcement Calculation

ACD calculates the Average Time to Answer statistic for all calls, subtracts the amount of time the call has been in queue, rounds up to the next minute, matches this number of minutes to the corresponding minutes set for the second announcement, and then plays the second announcement.  ACD constantly calculates Average Time to Answer and time in queue to update the second announcement.

## Announcement Sets

If you have selected User-Recorded Announcements when selecting Average QTime Announcement or Expected QTime Announcement as a Routing Step, you will use the Norstar Announcement Maintenance function to record the set of announcements.  Refer to Chapter 3: Using Norstar Sets, Performing Supervisor Functions, Announcement Maintenance, for directions to record these announcements.

Follow the same content for each announcement as provided below.  ACD will calculate and match to these numbers in the minute numbering plan.  You can alter the way in which you record Announcements 241 and 242

**User-Recorded Announcements for Average QTime and Expected QTime:**

**241:  "The average time to answer a call today is approximately…"**

**242:  "The expected wait time for your call is approximately…"**

**243:  "… one minute."**

**244:  "… two minutes."**

**245:  "… three minutes."**

**246:  "… four minutes."**

**247:  "… five minutes."**

**248:  "… six minutes."**

**249:  "… seven minutes."**

**250:  "… eight minutes."**

**251:  "… nine minutes."**

**252:  "… ten minutes."**

**253:  "… ten minutes or longer."**


**Pre-Recorded Announcements for Average QTime and Expected QTime:**

**267:  "The average time to answer a call today is approximately…"**

**268:  "The expected wait time for your call is approximately…"**

**269:  "… one minute."**

**270:  "… two minutes."**

**271:  "… three minutes."**

**272:  "… four minutes."**

**273:  "… five minutes."**

**274:  "… six minutes."**

**275:  "… seven minutes."**

**276:  "… eight minutes."**

**277:  "… nine minutes."**

**278:  "… ten minutes."**

**279:  "… ten minutes or longer."**


## Rules for Average QTime and Expected QTime Announcements:

- If a call takes longer to answer than 10 minutes, Announcement 253 (User-Recorded) or 279 (Pre-Recorded) will always play.

- The first caller in the routing period will receive Announcement 243 ("one minute") (User-Recorded) or 269 ("one minute") (Pre-recorded) because Average Time to Answer cannot be calculated for one call.

- If the AVERAGE QTIME ANNOUNCEMENT or EXPECTED QTIME ANNOUNCEMENT is repeated in a Routing Table and the recording of the time in minutes is greater than or equal to the last recording of the time in minutes, the next AVERAGE QTIME ANNOUNCEMENT or EXPECTED QTIME ANNOUNCEMENT will not play until the time in minutes is less than the previous AVERAGE QTIME ANNOUNCEMENT or EXPECTED QTIME ANNOUNCEMENT. The call will, in this event, be routed to the next Command.

  Example: Routing Step 3 is AVERAGE QTIME ANNOUNCEMENT and the time is 5 minutes. Step 4 is a DISTRIBUTE for 30 seconds. Step 5 is a GO TO Step 3. If the AVERAGE QTIME is 5 or more minutes the next time the call reaches this command, the announcement will be ignored and the call will reach the DISTRIBUTE Command. This call, for example, would remain in this loop between DISTRIBUTE and GO TO Step 3 until the call is answered or the time in minutes is less than 5 for the AVERAGE QTIME. It is advisable, therefore, to insert an ANNOUNCEMENT Command after the DISTRIBUTE that basically tells the caller "This call will be answered shortly."

- If a call is transferred out of the Group with a Transfer Command, the call becomes a Non-ACD Call and will no longer be associated with a Group and that Group's Routing Commands.

- If a call is transferred to another Group by the Group Routing Command, the Average Time to Answer statistic for the new Group will be in effect; therefore, the caller will hear a different time in minutes for the Average QTime or the Expected QTime if either command is utilized for the new Group.

- If a call is prioritized, it may be queued to be answered before a call that is not prioritized. In this event, the caller without a prioritized call may receive an Average QTime or Expected QTime Announcement that is not accurate because other prioritized calls have arrived during the same time frame and moved ahead of this call in the queue. If all calls are prioritized, calls may be answered before or after the time in minutes announced for the Average QTime or Expected QTime. Refer to Line Configuration, Destination Number Configuration (DNIS/DID), and Originating Number Configuration (ANI/ICLID) for more information on assigning a priority to certain calls.

# Glossary

# Glossary

## A

**Abandoned Call Report**

This Report provides Group, Date, Line, Time, and Duration of each ACD Call abandoned during a specified Time Period.  If available, ANI/ICLID and DNIS/DID Numbers will be designated.  This Report also displays the length of time that all calls spent in queue before being abandoned, and average length of time that all calls spent in queue before being abandoned.

**About ACD**

On the Status Menu, select About ACD to display important information on the application currently in use. Topics include: ACD Level, Version, Product ID, Number of Voice Ports, Add-Ons currently in use, Norstar KSU String, and Copyright information.

**ACD**

ACD is an automatic call distributor directing calls from the Norstar to Agents in Groups.  In the Reports Chapter, ACD is a call processing statistic defined as the number of ACD Calls currently active by each group.  In the Status Chapter it is an Agent statistic defined as the number of ACD Calls being handled by this Group.

**ACD Call Profile Detail Report**

This Report provides a count or percentage of ACD Calls received during a specified period of time.  The Report displays: number of calls abandoned, number of call picked up and disconnected, and number of calls transferred.

**ACD Call Profile Summary Report**

This Report provides a count or percentage of ACD Calls received during one day.  The Report displays: number of calls abandoned, number of call picked up and disconnected, and number of calls transferred.

**ACD Control**

This Main Menu option allows you to perform the following operations: Activate, Deactivate, Execute, Off-Line, Return, and Shutdown.  Refer to these terms in this Glossary.

**ACD Duration**

A report field (column) for Line Profile Report defined as the total amount of ACD Time during the time period for the day.

**ACD (Group)**

An Agent statistic defined as the number of ACD Calls from other Groups being handled by this Group.

**ACD Line**

When you assign a Group to a Line in ACD, it becomes an ACD Line.

**ACD Time**

On the Agent Profile Report, ACD Time reflects how long Agent was available, how long Agent talked, how long Agent put caller on hold, how much wrap time Agent used, how long Agent went unavailable, how many calls Agent answered, and how many time Agent requested a Supervisor's help.

**ACD Security Key**

This security key is an Input/Output Device attached to the end of the parallel printer cable that connects to the parallel printer port on the Applications Module.  This key is needed to run ACD.

**Activate**

On the ACD Control screen you can select Activate to start Call Processing that was previously deactivated.

**Activate Changes**

After configuration changes are saved, you can select Update Configuration on the Configuration Menu to either activate these configurations now or schedule them for a later update.

**Add-Ons**

In the Overview Chapter, Introduction section, the ACD Add-Ons are listed in a table.  These features are available to you with this software version and will require an installation.  Add-Ons include: Automated Attendant Routing Command, Caller Directed Routing, Status Display  for Windows 95/98/NT, Infocus Status Display, Wallboard, and Voice Port Activation.  These Add-Ons are installed.  Refer to the Norstar PRELUDE and CINPHONY Suite ACD 3.6 Installation Guide for details.

**Agent**

An Agent is the person who answers an ACD Call.  Agents can be assigned to a Group.  Refer to this Glossary for a definition of Agent Configuration and Agent Selection subscreen (Group Configuration).

**Agent Configuration**

ACD allows you to add, update, or delete Agents.  Select Agent Configuration on the Configuration Menu.

**Agent Data for (ACD or Non-ACD) Calls**

For the Agent Profile Report you can specify whether to report on ACD or Non-ACD Calls handled by Agents.  If you select ACD, you can specify whether the Report Style (or method) is Duration or Percent.  If Non-ACD is selected, the Report Style can only be a Duration method.

**Agent Functions**

On the Feature Codes Assignments screen there are 7 Agent Functions you can perform on the station set.  These functions include: LOGIN, UNAVAILABLE, CANCEL WRAP, HELP, CALLS QUEUED, CATEGORIZE, CALLS QUEUED, and RECORD CALL.  Refer to this Glossary for a definition of each function.

**Agent ID #**

On the Agent Configuration screen, the Agent ID# is used by ACD to login and identify an Agent to the system.  You can either add, update, or delete an Agent.  In Recorded Calls (Maintenance Menu), the Agent ID for the Agent who has recorded a call will display on the screen.

**Agent Password**

When adding an Agent to the database on the Agent Configuration screen, you can add a Password for the Agent.  When the Agent logs into ACD on the station set, this Password must be entered.

**Agent Profile by Group Report**

This Report provides an Agent's performance by Group(s) over a specified period of time.  The Report displays: amount of logged-in time, time spent on ACD Calls and how that time was spent (conversation, wrap, etc.), time spent on ACD Calls for each Group, number of calls answered, and number of times Supervisor help was requested.

**Agent Profile Report**

This Report provides an Agent's performance over a specified period of time.  This Report displays: amount of logged-in time, time spent on ACD Calls and how that time was spent (conversation, wrap, etc.), time spent on Non-ACD Calls, number of calls answered, and number of times Supervisor help was requested.

**Agent Reports**

There are 2 Agent Reports that you can run (generate): Agent Profile Report and Agent Profile by Group Report.  Refer to this Glossary for a definition of each Report.

**Agent Selection**

On the Group Configuration screen you can add an Agent to a Group or delete an Agent from a Group.

**Agent Status**

The Group Status Display screen displays the status of each Agent for the Group.  Agent status includes: Logged In, Logged Out, Available, Unavailable, currently in wrap, handling Intercom calls, handling Incoming calls, and handling Outgoing calls.  There is also an Agent status for the number of ACD Calls

# Glossary

currently handled by the Group, and the number of ACD Calls from other Groups being handled by the Group.

**Alert**

When a call reaches this command in the Routing Table, the specified station set rings to alert a Supervisor or Agent that a call has reached this alert step.

**Alternate Group**

On the Agent Profile by Group Report, this column provides the amount of ACD Time, or percentage of time, an Agent took calls from another Group.

**Analog Station Set**

You can use a 2500-Compatible Analog Station Set with ACD.  You can only perform, however, a Login/Logout and Available/Unavailable.  To install an Analog Station Set, refer to the Norstar PRELUDE and CINPHONY Suite ACD 3.6 Installation Guide.

**Analog Station Set Parameters**

There are 2 Parameters to configure for Analog Station Sets: Login/Logout DN and Unavailable/Available DN.  Refer to  Configuration Menu, System Wide Parameters for more information and directions.

**ANI (Automatic Number Identification)**

On the Originating Number (ANI/ICLID) Configuration screen, you can specify an ANI Number.  When a call arrives on a line with this number, this number will display to inform you who is calling.

**Announcement**

This Routing Command is used to play a recorded announcement for a caller when an Agent is unavailable.  The announcement is interrupted when an Agent becomes available to take a call.  Refer to this Glossary for a definition of Forced Announcement.

**Announcement Maintenance**

A Supervisor can enter a feature code on the station set to record an announcement or play back an announcement.

**Appendices**

Appendix 1: Error Messages - provides error and informational messages received on station sets by Agents and Supervisors.  Appendix 2: Troubleshooting - provides solutions for some possible problems you may encounter.  For example, ACD may not load or print because a cable may be loose.  Appendix 3: Export Data Record Formats to help you build external spreadsheets and databases from exported ACD data.  Appendix 4: ACD Agent Login / Logout.  Appendix 5: Tips and Hints.  Appendix 6: Virtual Modem. Appendix 7:  Average & Expected Qtime Announcements.

**Archive and Purge**

In Maintenance you can copy processed call data from database to diskettes while deleting this data from database.

**Archive Data**

In Maintenance you can copy processed call data from database to diskettes.

**Archive Disks**

As you Archive Data, ACD will ask you to insert diskettes into the floppy disk drive as processed data is copied from database.

**ATA**

Analog Terminal Adapters connect the digital Norstar to an analog device.  A Directory Number (DN) is assigned to each ATA in use.  Refer to the Norstar PRELUDE and CINPHONY ACD 3.6 Installation Guide for more information and diagrams.

**Auto Logout Duration**

On the Group Configuration screen, Auto Logout is the time allotted for an Agent's phone to ring before the Agent is logged out and the call is directed to the next available Agent.

### Automated Attendant (AUTO ATTD)

This Routing Command is available as an Add-On to ACD.  You can use this command to play an Announcement to the caller.  The caller presses specified keys on the Station Set keypad to attend to the call.  You can then direct the call, by the keys the caller presses with the following commands: CDR TABLE, CONTINUE, GO TO STEP, GROUP, REPLAY, and TRANSFER.  Refer to Group Configuration, Routing, for more details.

### Available

Agent is logged in and ready to take calls.  On the station set, the Agent can enter the feature code to go unavailable and available.  Refer to this Glossary for a definition of Unavailable.

### Average Abandoned

On the Group Profile Report, this report field (column) provides the average amount of ACD Time caller waited before hanging up (total time all calls spent in queue before being abandoned divided by total number of abandoned calls).

### Average Answered

On the Group Profile Report, this report field (column) provides the average amount of ACD Time caller waited before Agent answered (total time all calls spent in queue divided by total number of answered calls).

### Average Hold

On the Group Profile Report, this report field (column) provides the average amount of ACD Time Agents kept callers on hold (total time divided by total number of answered calls).

### Average QTime Announcement

On the Group Configuration screen, Routing Table subscreen, you can select this Routing Command to announce to the caller how long the caller might have to wait before the call is answered.

### Average Talk

On the Group Profile Report, this report field (column) provides the average amount of ACD Time Agents spent conversing with callers (total time divided by number of answered calls).

### Average Wrap

On the Group Profile Report, this report field (column) provides the average amount of ACD Time Agents spent on wrap-up (total time divided by total number of answered calls).

# B

### Block # / Time

On the ACD Call Profile Detail and Summary Report screens, you can type in a time interval (block of time in seconds) to receive statistical call data.  There are 15 blocks of time you can specify.

### Busy Report

This Report provides the Date, Start Time, End Time, and Duration when all Lines, assigned to an ACD Group, are busy.

# C

### Calculations: Formulas and Examples

On the Wallboard Configuration screen you can select the System or Group statistics you want to display on the Wallboard.  In this section of this Guide, the calculations are displayed with the formulas and also an example of application.

### Call Categorization Configuration

When a call is taken by an Agent and the Forced Categorization feature is set to YES, the Agent is prompted at the station set to enter a Call Category Number.  If Force Categorization is set to NO, the

Agent can still use the feature keys to enter this number. On the Call Categorization Configuration screen, you can add, update, or delete a Call Category Number from the database.

**Call Categorization Report**

This Report provides a summary of call category information over a specified period of time. The Report displays: number of calls logged for each category within the reporting period.

**Call Category Number**

On the Call Categorization Configuration screen, you can add, update, or delete a Call Category Number from the database.

**Caller Directed Routing (CDR)**

On the Caller Directed Routing Number Configuration screen, you can add, update, or delete CDR Numbers in the CDR Table.

**Call Number**

On the Recorded Call Maintenance screen, you can view the Call Number assigned by ACD for all Recorded Calls. The Agent recording the call, and the Date and Time the call was recorded can also be viewed.

**Call On Demand**

YES **–** places an Agent in a "Perpetually Unavailable" state when the Agent logs in. The only way that an Agent can receive a call in this state is to manually press the Available programmed key on the station set. The Agent would be momentarily available to receive a call; however, when the Agent ends the call, the Agent would become Unavailable. This functionality is ideal for a Supervisor or backup Agent, for example, to retrieve calls when they are reaching capacity until the calls return to a normal distribution.

NO – places an Agent in an Available state when the Agent logs in.

Call on Demand can not be applied when using Categorization Codes or when using C3050 and C3060 Companion Portable Station Sets

**Call Processing Statistics**

On the System Status and Group Status Display screens, the real-time Call processing Statistics can be viewed. The System (all Groups) statistic topics include: Routing, Logged In, Logged Out, Available, ACD, Wrap, Unavailable, Calls Queued, Longest Queued, Calls Overflowed Out, Calls Answered, Average Time To Answer, Calls Abandoned, Average Time To Abandon, Calls Disconnected, and Calls Transferred. The Group statistic topics include: Calls Queued, Longest Queued, Calls Overflowed Out, Calls Answered, Average Time To Answer, Calls Abandoned, Average Time To Abandon, and Calls Transferred.

**Calls**

On the Overflow Group Configuration screen, you can specify the number of calls that must be in queue before overflow begins. You can use Calls and/or Duration to set overflow thresholds. If either threshold is met, overflow will occur.

**Calls Abandoned**

On the Group Profile Report, this report field (column) provides the number of ACD Calls that were not answered by an Agent or because the caller hung up.

**Calls Answered**

On the Group Profile Report, this report field (column) provides the number of ACD Calls that were answered by the Group.

**Calls Overflowed Out**

On the System Status Display screens, you can view the total number of calls overflowed out of one Group and answered by other Groups.

**Calls Picked Up or Disconnected**

On the Group Profile Report, this report field(column) provides the number of calls answered on a station set other than the original station set by the Norstar "Call Pick-up" feature, or calls disconnected by the Disconnect Routing Command.

**Calls Queued**

On the System and Group Status Display screens, you can view the number of calls in the queue for all Groups and for a Group.

**Calls Received**

On the Group Profile Report, this report field (column) provides the number of ACD Calls distributed to the Group.

**Calls Transferred**

On the Group Profile Report, this report field (column) provides the number of ACD Calls transferred, by the TRANSFER TO, GROUP, LINE XFER, LINK XFER, CDR TABLE, or VMAIL XFER routing commands.

**Cancel Wrap**

This is an Agent Function performed on the station set. It enables the Agent to eliminate the specified length of time needed to wrap up the last call and become available to receive the next call. A cancel wrap time period can be specified if Wrap is set to AUTOmatic. If Wrap is set to MANUAL, the Agent must use the feature code to cancel wrap.

**Category By Agent Report**

This Report provides the number of calls logged for each Category by Agent during a specified time period. If Category Description was entered during Configuration, it will also display.

**Categorization Reports**

On the Reports Menu, you can select 2 Categorization Reports: Category By Agent Report and Call Categorization Report. Refer to these Reports in this Glossary or to the Reports chapter in this Guide.

**Categorize**

This is an Agent Function performed on the station set. At the end of a call, the Agent enters a tracking code or category for each ACD Call. Refer to this Glossary for a definition of Force Categorization.

**Category Description**

This is a brief definition assigned to the Category Number on the Categorization Code screen.

**Category Number**

On the Call Categorization Report, this report field (column) provides the number assigned to the calls that Agents entered at their station sets.

**CDR Number**

On the Caller Directed Routing Number Configuration screen you can add, update, or delete a CDR Number on a CDR Table. You can add up to 1,000 CDR Numbers for a CDR Table.

**CDR Number Description**

On the Caller Directed Routing Number Configuration screen you can add or update a CDR Description for every CDR Number configured.

**CDR Table**

On the Caller Directed Routing Number Configuration screen you can utilize a CDR Table to configure CDR Numbers. You can configure up to 1,000 CDR Numbers for a Table.

**CDR TABLE (Group Configuration)**

You can utilize this routing command to send a call to a CDR Table.

**CDR TABLE (Automated Attendant Routing Command)**

You can utilize this routing command within the AUTO ATTD routing command to send a call to a CDR Table.

**Command**

On the Routing Table Profile Report, this report field (column) tracks the routing commands used.

**Common Report Parameters**

At the beginning of the Reports Chapter, there is a list of report parameters that are common to all reports. The directions on how to complete these fields are also in this section.

**Condensed Print Codes**

On the Printer Configuration screen, you can specify the codes for 132 column condensed mode, carriage return, and line feed for a printer not on the list of printers (F2 list). These codes are found in your printer manual.

**Config**

This Voice Port state is the first state to display on the screen. It configures the Voice Port to display an IDLE or UNUSED state.

**Configuration**

These menus and configuration screens enable you to specify how your call center is setup. When configuration information is saved and activated, it becomes a record in the database. New records can be added, and existing records can be updated or deleted.

**Configuration Directory**

When configuration information is saved, it is automatically copied to the configuration directory - C:\CINPHONY\DATBAK>. As configuration information is vital to your call center and time consuming to re-enter, this directory provides a backup copy of all configuration information.

**Copy Group**

On the Group Configuration screen you can select Copy Group to copy all the field information from one Group configuration to the Group Configuration you have opened. Refer to that section in this Guide for more details.

**Copy Report/File to Drive A:**

This Report/File Maintenance utility enables you to copy the contents of any ACD Report, Exported File, or Recorded Announcement File to a floppy disk in drive A:. Make sure the floppy is properly formatted and labeled.

**Count**

Refer to Report Style.

# D

**Daily Auto Purge/Process Time**

On the Data Management parameters screen, Maintenance Menu, you can specify a time of the day to automatically purge processed data from the hard drive. You can also specify a Data Storage Period. Refer to the section in this Guide for more details.

**Data Storage Period**

On the Data Management Parameters screen, Maintenance Menu, you can specify how many days you want data to be stored before it is automatically purged. Refer to the section in this Guide for more details.

**Data Management Parameters**

On the Maintenance Menu, you can display the Data Management Parameters screen where you can specify a time of day to automatically purge processed data and the number of days you want to store this data before it is purged. Refer to the section in this Guide for more details.

**Date**

The Date is a Common Report Parameter. For all Reports, you can specify a From and Thru Date.

**Date Format**

On the Export Data screen you can select a Date Format from a list of 7 types of formats; these include:

- MM/DD    (10/21)
- DD/MM    (21/10)
- DD MMM    (21 Oct)
- MMM DD    (Oct 21)
- MM/DD/YY  (10/21/99)
- DD/MM/YY  (21/10/99)
- YY/MM/DD  (94/10/21)

**Day Routing Commands**

These commands are used to route calls during the Day Routing Hours specified.  Refer to Routing Hours.

**Deactivate**

On the ACD Control Menu, you can select Deactivate to stop Call Processing.  Once you have deactivated, you can then execute an Add-On, Upgrade, or Update install, perform a system Shutdown, or Activate Call Processing.

**Delay (ICLID Delay Time)**

In Line Configuration, you can specify a 5 second delay when a call arrives on a Line.  ACD will not answer the call until the 5 seconds pass or ICLID information is received from the Norstar.

Refer to System Wide Parameters (Configuration Menu) to specify the length of time for the delay period.

**Delay Answer**

This Routing Command delays the answering of a call for the time period specified (range - 00:01 to 59:59).  When a call arrives on a Line assigned to a Group,  ACD will refrain from answering until either the DELAY ANSWER time has passed or an Agent becomes available.  When used, this Command must be specified as first Routing Command.

**Delete Record**

By pressing the Alt F10 Keys simultaneously, you can delete a Configuration Record (e.g., Agent, Group, Supervisor, Overflow Group, etc.).  In the Reports, Scheduler, and Report/File Maintenance, you can delete (Alt F10) a Schedule for Report generation, or a Report that has been generated as a file.

**Description**

For most of the Configuration Records (e.g., Group, Agent, Line, etc.), you can enter a description to further identify the record and report.

**Destination Number (DNIS/DID)**

On the Line Configuration Menu, you can display the Destination Number (DNIS/DID) screen where you can specify a DNIS or DID Number.  A DNIS or DID Number is supplied by your Service Provider as a string of digits. These digits are what ACD designates as a Destination Number.  Refer to the section in this Guide for more details.  Also refer to Line Configuration, Routing.  A destination Number (DNIS/DID) Report can also be generated, refer to that section in this Guide.

**DN (Directory Number)**

A DN is the directory number assigned to an ATA (Analog Terminal Adapter).  Refer to this Glossary for a definition of ATA.

**DNIS (Dialed Number Identification Service)**

This is the number the caller called (the internal destination number, usually 800 or 900 numbers).  Refer to Destination Number in this Glossary and to the section in this Guide.

**DID (Direct Inward Dial)**

This is the number the caller called directly (the internal destination number).  Refer to Destination Number in this Glossary and to the section in this Guide.

# Glossary

**Digit Timeout**

On the System Wide Parameters screen (Configuration Menu) you can specify the time a user has to press a key on the Station Set before the AUTO ATTD's NONE step sends the call to the specified command. For Caller Directed Routing, the Digit Timeout is the time a user has to press a key on the Station Set after the Primary Announcement has played and, if applicable, after each Secondary Announcement is played.

Refer to Group Configuration, Routing, for more details.

**Disabled (Voice Port)**

At the bottom of the System and Group Status Display screens, all Voice Ports are listed with their current state. A Disabled Voice Port is considered not in use due to a possible hardware failure.

**Disconnect**

On the Routing subscreen (Group Configuration), you can select this Routing Command as a step to end a call. No entry is required in the Value field.

**Display on Station Set**

On the System Wide Parameters Configuration screen, you can select whether you want Group, DNIS/DID Description, CDR Number, or CDR Number Description to display on Agents' Stations Sets when ACD calls are received.

**Distribute**

On the Routing subscreen (Group Configuration), you can select this Routing Command as a step to send a call to the first available Agent in the Group within the time specified. Type in the time (MM:SS format of at least 1 second) in the Value field.

**DOS-Shell**

On the Main menu, you can select DOS-Shell to exit ACD and display the CINPHONY DOS Prompt (Directory) - C:\CINPHONY>. Call Processing will remain active.

**Duration**

On the Overflow Group Configuration screen, you can specify the duration of a call before overflow begins. You can use Duration and/or Calls to set overflow thresholds. If either threshold is met, overflow will occur.

**Duration (Report Style)**

Refer to this Glossary for a definition of Report Style.

# E

**Emergency Routing**

The Emergency Group can be enabled from a station set. Once enabled, the Emergency Group will handle all incoming calls.

**Emergency Group Setup**

On the Emergency Setup configuration screen, you can add or delete an Emergency Group. After adding an Emergency Group, a Supervisor or an Agent can route all calls to this Group from the station set.

**Execute**

On the ACD Control Menu, you can select Execute to perform the following installs: Add-On, Upgrade, or Update. You must first select Deactivate to stop Call Processing before using Execute.

**Expected QTime Announcement**

On the Group Configuration screen, Routing Table subscreen, you can select this Routing Command to announce to the caller how long the caller might be expected to wait before the call is answered.

**Export Data**

You can use this export function to create quote-delimited files for use in other database packages. This call data includes these files: CALL.EXP, AGENT.EXP, BUSY.EXP, and CATEG.EXP. Refer to Appendix 3: Export Data Record Formats for more details on these files.

# F

**Feature Button**

The Norstar station sets have a Feature Button that, after being pressed, enables you to enter a 3-digit feature code and perform Supervisor and Agent Functions. On the Feature Code Assignments screen, you can view the codes Norstar has assigned to these functions.

**Feature Codes**

On the Feature Code Assignments screen, you can view the codes Norstar has assigned to Agent and Supervisor Functions.

**File Name**

On the Report screens, you can specify report generation to 1 of 2 types of Files as an output device. After selecting the File, you will be asked to enter a filename to identify the report. The .RPT or .HTM filename extension cannot be changed.

**First Name**

On the Agent Configuration screen, you can add, update, or delete an Agent. When adding or updating an Agent, you can enter the Agent's First and Last name for further identification. The first initial of the First Name and the first 8 characters of the Last Name will appear on the station set when the Agent logs in.

**Forced Announcement**

On the Routing subscreen (Group Configuration), you can select this Routing Command as a step to play an announcement without interruption. The announcement number is entered in the Value field.

**Form Feed**

On the Printer Configuration screen, you can specify YES or NO for Form Feed. YES - Printer is configured for Form Feed, prints next page on previous page if page break on previous page occurs before specified page length; NO - prints next page regardless of where previous page's page break occurs (carriage returns are inserted to end of page).

**Form Length**

On the Printer Configuration screen, you can specify the maximum number of lines that will fit on the form selected, based on 6 lines per inch. A standard 11 inch form is 66 lines.

**From Range**

On the Report screens, you can specify the start (From) and end (Thru) for report parameters such as, Date, Time, Group, Agent ID, etc. Refer to this chapter in the User Guide, Common Report Parameters, for the From and Thru Rules.

# G

**Go To Step**

On the Routing subscreen (Group Configuration), you can use this Routing Command as a step to return caller to a previously specified step, execute that step's command, and then repeat the following commands.

**Group**

On the group Configuration screen, you can add, update, or delete a group from the database.

**Group Overflow Report**

This Report provides a summary of call overflow for all configured Groups. The Report displays: outgoing overflow groups, inward overflow, number of calls received, number of calls answered, number of calls abandoned, number of calls picked up and disconnected, and number of calls transferred.

**Group Profile Report**

This Report provides a Group's performance over a specified period of time. The report displays: number of calls received, number of calls answered, number of calls abandoned, time spent in queue before answered or abandoned, number of auto-logouts, and requests for Supervisor help.

**Group Reports**

There are 3 Group Reports that you can run (generate): Group Profile Report, Group Overflow Report, and Routing Table Report.  Refer to this Glossary for a definition of each Report.

**Group (Routing Command)**

On the Routing subscreen (Group Configuration) you can use the Group Command as a step to send a call to a different group than the one defined.  You will need to enter the Group Number in the Value field.

**Group Status Display**

You can view the real-time call processing statistics for a Group, the current status of each Agent, and the current Voice Ports states.  You will be able to monitor Group performance and identify problems as they occur.

# H

**Help (F1)**

For every ACD screen field there is a help screen defining the field and brief directions on how to complete field information or confirm the use of the field information.  Press the F1 Key when the cursor is positioned on the field.

**Help (Supervisor)**

This is an Agent Function performed on the station set. It enables the Agent to request help from the Supervisor while on a call.

**Hold**

On the Agent Profile Group Report, this report field (column) provides the amount of ACD Time, or percentage of time, an Agent wrapped-up between calls for each Group during the specified time period. The Report displays: amount of logged-in time, time spent on ACD Calls and how that time was spent (conversation, wrap time, etc.), time spent on ACD Calls for each Group, number of calls answered, and number of times Supervisor help was requested from Agents in Group.

**HTML**

On all  Report screens, Output Device, you can specify to output a Report to a HTML format if you have installed LAN Status Display and Reporting as an Add-On.  This generated Report is given a .HTM extension.  From the Remote Server PC, you can utilize a Browser to view and print these Reports.

# I-K

**ID #**

On the Supervisor Configuration screen, you can add, update, or delete a Supervisor.  The ID# field enables you to type in a new Supervisor ID, select an existing Supervisor from a list, or delete an existing Supervisor from list.

**Idle (Voice Port)**

At the bottom of the System and Group Status Display screens, all Voice Ports are listed with their current state.  An Idle Voice Port is available but not being used.

**Include Groups**

On the Monthly Summary Report screen, this field allows you to specify or select the Groups you want to include in the Report.

**Incoming Calls**

Near the bottom of the Group Status Display screen, this Agent statistic displays the number of Agents handling Non-ACD Incoming Calls.  On an Agent Profile Report, this report field (column) provides the number of transferred and incoming Non-ACD Calls.

**Incoming Duration**

On an Agent Profile Report (Non-ACD Duration), this report field (column) provides the amount of time an Agent was on transferred or incoming Non-ACD Calls.

**Increase Priority**

On the Routing subscreen (Group Configuration), this Routing Command is used as a step to increase the priority of a call incrementally so that it gets distributed and answered by the first available Agent.

**Indicator FlashRate 1 & 2**

When a call is in queue, the Login Indicator light on the Agent's station set will flash. On the System Wide Parameters screen (Configuration Menu), you can set the flash rate breaks points of slow, medium and fast. Refer to the section in this Guide for more details.

**Indicator Lights**

On the Norstar station sets there are programmable feature buttons bordering the LCD Indicator light panel. When any of the features is in use (e.g., Login, Unavailable, etc.), an Indicator Arrow will display on the panel beside the programmed feature button.

**Infocus Status Display - COM**

This ACD Add-On allows you to connect via COM Port up to 4 Remote PCs to the Applications Module and view the statistics for Groups, Agents, and Voice Port states. You can graph and manipulate these statistics in this application, and you can set alarms on Group statistics that do not meet your limits. Refer to the Infocus Installation and User Guide directions on installation and use. On the Infocus Status Display Configuration screen, you will need to configure the following so that the ACD can send Call Data to the Remote PC(s): Baud Rate, COM Port, Dynamic Data Rate, and Configuration Data Rate.

**Infocus Status Display - LAN**

This ACD Add-On allows you to connect via NIC (Network Interface Card) an Infocus Server PC to the Applications Module and view via Browser the statistics for Groups, Agents, Voice Port Status, and Reports generated to a HTML format. You can also connect additional Infocus Client PCs to the network and utilize Browsers to use Infocus. You can graph and manipulate these statistics in this application, and you can set alarms on Group statistics that do not meet your limits. Refer to the Infocus Installation and User Guide directions on installation and use. On the Infocus Status Display Configuration screen, you will need to configure the following so that the ACD can send Call Data to the Infocus Server PC: Dynamic Data Rate, Configuration Data Rate, Name /IP Address, and TCP/IP Port Number.

**Init (Initializing)**

At the bottom of the System and Group Status Display screens, all Voice Ports are listed with their current state. An Initializing Voice Port is trying to reset from an error that has occurred.

**Insert a Command/Value**

On the Routing subscreen (Group Configuration), you can insert a Routing Command between existing Commands by pressing the Alt I keys simultaneously.

**Intercom Calls**

Near the bottom of the Group Status Display screen, this Agent statistic displays the number of Agents handling Intercom Calls. On an Agent Profile Report (Non-ACD Duration), this report field (column) provides the number of Intercom calls.

**Intercom Duration**

On an Agent Profile Report (Non-ACD Duration), this report field (column) provides the amount of time Agent was on the Intercom.

**Inward Overflow**

On the Group Overflow Report, this report field (column) provides the total number of calls that overflowed from other groups to the subject Group specified.

**Keypad**

The keypad on the Norstar station sets is used to dial numbers for outgoing calls, enter numbers for various features and their codes, and perform functions.

## L

**Last Name (Agent)**

On the Agent Configuration screen, you can add, update, or delete an Agent.  When adding or updating an Agent, you enter the Agent's First and Last name for further identification.  The first initial of the First Name and the first 8 characters of the Last Name will appear on the station set when the Agent logs in.

**Line Configuration**

On the Line Configuration screen, you can add a Line, update an existing Line, or delete a Line from the database.  When adding or updating a line, you can also assign a Group or CDR Table to the Line and prioritize the use of the line and/or delay the answering of a Line.  You can also route certain Destination Number, Originating Number, and/or Caller Directed Routing calls to a different Group or CDR Table than the one used for the specified Line.

**Line Profile Detail Report**

This Report provides a summary of ACD line usage.  The report displays: number and duration of calls received during specified intervals, summary ACD Call activities during specified intervals, number and duration of all incoming and outgoing calls during specified intervals, and the percentage of the interval that the Line was in use.

**Line Profile Summary Report**

This Report provides a summary of ACD line usage.  The report displays: number and duration of calls received for one day, summary ACD Call activities for one day, number and duration of all incoming and outgoing calls for one day, and the percentage of the interval that the Line was in use.

**Line Reports**

There are 4 Line Reports you can generate:  Line Profile Detail Report, Line Profile Summary Report, Busy Report, and Destination Number (DNIS/DID) Report.  Refer to the Reports chapter in this Guide for more information.

**LINE XFER**

On the Group Configuration screen, you can display the Routing subscreen where you can use this routing command to transfer a call to a specific Norstar Line.  Refer to the Group Configuration section in this Guide for more details.

**LINK XFER**

On the Group Configuration screen, you can display the Routing subscreen where you can use this routing command to transfer a call to an extension or number outside the Norstar.  Refer to the Group Configuration section in this Guide for more details.

**Log Date**

On the Agent Profile by Group Report, this report field (column) provides the Agent login period (within From/Thru range) for each Group listed in ascending order.

**Logged In**

On the System Status Display screen, this call processing statistic provides the number of Agents logged in to each group.  On the Group Status Display screen, Agent status, this statistic provides the number of Agents logged in for a Group.

**Logged Out**

On the System Status Display screen, this call processing statistic provides the number of Agents logged out of each group.  On the Group Status Display screen, Agent status, this statistic provides the number of Agents logged out of a Group.

**Login**

On the Norstar station sets, an Agent can use this function to login.  The Agent must enter their ID Number, and, if used, their password to use ACD.

**Login Duration**

On the Agent Profile Report, this report field (column) provides how long a Agent was logged in for the specified time period.

**Logout**

On the Norstar station sets, an Agent can use this function to logout.

**Log Out**

On the Agent Profile by Group Report, this report field (column) provides the time of day an Agent logged out for each group for the specified time period.

**Longest Idle**

On the Group Configuration screen, you can select Longest Idle from the Method of Selection list.  This is a method of routing calls to the Agent who has been available the longest to take a call.  Refer to this Glossary for a definition of Round Robin and Top Down.

# M

**M7208, M7310, M7410, M7324**

These are the model numbers for the Supervisor and Agent Norstar Station Sets.  The M7208 is an Agent Set; the M7324 and the M7310/M7410 can both be used by Agent and Supervisor.  Refer to this chapter in the User Guide for more details.

**Main Menu Options**

There are 6 Main Menu Options from which to select: Configuration, Status, Reports, Maintenance, ACD Control, and DOS-Shell.

**Maintenance Menu**

Maintenance provides the following utilities to help you manage ACD call data:  Archive Data, Archive and Purge Data, Purge Data, Restore Archived Data, Recorded Calls, Export Data, and Data Management Parameters (automatic process/purge).  Refer to these terms in this Glossary for definitions.

**Menu Password Configuration**

On the Password Configuration screen, you can select from a list of 6 Main Menu selections to assign a Password: Configuration Menu, Reports, System Maintenance Menu, ACD Control, and DOS-Shell.

**Menus and Screens**

This section provides an overview of the structure of ACD and how you can navigate through the various menus and screens.

**Menu Password Configuration**

On the Password Configuration screen, you can select from a list of 6 Main Menu selections to assign a Password: Configuration Menu, Reports Menu, Maintenance Menu, ACD Control, and DOS-Shell.

**Method of Selection**

On the Agent Selection subscreen (Group Configuration), you can select one of 3 methods for selecting an available Agent to take the next call: LONGEST IDLE, ROUND ROBIN, and TOP DOWN.  Refer to this Glossary for a definition of each method.

**Monitor Call**

On the Norstar station sets, a Supervisor can enter a feature code and use this function to silently monitor (listen in on) an Agent's call and/or join in the call.

**Month**

On the Monthly Summary Report screen, you are required to enter or select the month and year on which to report.

**Monthly Summary Report**

This report provides a summary of the entire system or Group performance.  The Report displays: number of calls received, average time spent on various aspects of ACD Calls, number of auto-logouts, number of requests for Supervisor help, and number of incoming, outgoing, and intercom calls made during reporting period.

**Move Report/File to Drive A:**

This Report/File Maintenance utility enables you to move the contents of any ACD Report, Exported File, or a Recorded Announcement File to a floppy disk in drive A:.  Make sure the floppy is properly formatted and labeled.

# N

**Name (Supervisor)**

On the Supervisor Configuration screen, you can add, update, or delete a Supervisor.  When adding or updating a Supervisor, you must enter a Name for the Supervisor.

**Night Commands**

On the Routing subscreen (Group Configuration), you can add or delete Routing Commands on the Night Routing Table.  These commands will become effective when Day Routing Hours have concluded.

**No Answer**

On the Routing subscreen (Group Configuration), you can use this Routing Command as a step to have a call continue to ring until the caller hangs up.  No entry is required in Value field.

**Non-ACD Line**

A Non-ACD Line is any line that has not been assigned to a Group in ACD as an ACD Line.  On the Line List configuration screen, you can specify which lines will be ACD Lines.  ACD Lines can be displayed in ACD and assigned a priority in case a call is transferred into a Group.

**Normal Print Codes**

On the Printer Configuration screen, you can specify the codes for normal default print codes - 80 column mode for a printer not on the list of printers (F2 list).  These codes are found in your printer manual.

**Norstar Station Sets**

Refer to this Glossary for more information on models M7208, M7310, M7410, and M7324.  Also refer to the Using Norstar Sets chapter for more details and diagrams.

**Number (Recorded Announcement)**

On the Recorded Announcement Configuration screen, you can add or update a description for the existing Recorded Announcements.

# O

**Off-Line**

On the ACD Control Menu, you can select Off-Line to use ACD without active Call Processing.  You will be able to Configure, generate reports, modify the Scheduler, and perform any function not requiring a connection to the KSU.

**Originating Number (ANI/ICLID)**

On the Line Configuration Menu, you can display the Originating Number (ANI/ICLID) screen where you can specify an ANI or ICLID Number.  Refer to the section in this Guide for more details.  Also refer to Line Configuration, Routing.

**Outgoing Calls**

Near the bottom of the Group Status Display screen, this Agent status displays the number of Agents handling Outgoing Calls for this Group.  On an Agent Profile Report, this report field (column) provides the number of outgoing calls.

**Outgoing Duration**

On an Agent Profile Report (Non-ACD Duration), this report field (column) provides the amount of time Agent was on outgoing calls.

**Outgoing Overflow Groups**

On the Overflow Group Report, this report field (column) lists the calls that overflowed to this Group from the subject Group.  These calls are labeled at the end of the row.

**Output Device**

On all Report screens, you can specify the Output Device where you want a report to generate.  Output Devices include: Printer, File with Printer Codes, and File without Printer codes, HTML format, and Screen.  Refer to the section Common Report Parameters, for directions on selecting an Output Device.

**Overflow**

On the Overflow configuration screen, you can add, update, or delete an Overflow Group.  Overflow enables you to specify a Group to make calls available when the original Group has received too many calls, or has had a call in queue for too long.

# P

**Page Break on Agent ID**

On the Agent Profile and Agent Profile by Group Report screens, you can specify whether you want page breaks to occur after each Agent profile, or if you want page breaks to occur normally so that the next profile starts after the previous.

**Page Break on Group**

On the ACD Call Profile Report and the Routing Table Profile Report screens, you can specify whether you want page breaks to occur after each Group's profile, or if you want page breaks to occur normally so that the next profile starts after the previous.

**Page Break on Line**

On the Line Profile Report screen, you can specify whether you want page breaks to occur after each Line Profile, or if you want page breaks to occur normally so that the next Line profile starts after the previous.

**Page Break on Topic**

On the Scheduler screen, you can specify whether you want page breaks to occur after each Topic, or if you want page breaks to occur normally so that the next Topic profile starts after the previous.

**Page Length**

On the Printer Configuration screen, you can specify the number of lines you want to print on each page. 60 lines allows for a 1/2 inch top and bottom margin.

**Passwords**

On the Agent Configuration and Supervisor Configuration screens, you can assign a password to these records when adding or updating.

**Percent**

Refer to Report Style.

**Percent Time Busy**

On the Line Profile Report, this report field (column) provides the percentage of the time period that the Line was in use.

**Play Call**

On the Norstar station sets, a Supervisor can use this function to play back calls previously recorded by Agents.

**Playing (Voice Port)**

At the bottom of the System and Group Status Display screens, all Voice Ports are listed with their current state.  For example, a Playing Voice Port is currently playing a recorded call or a recorded announcement.

**Port**

On the Voice Port Configuration screen, you can view a DN for the available Voice Ports. In Status, the System Status Display and Group Status Display screens show the Voice Port states at the bottom of the screens.

**Port Timeout**

On the System Wide Parameters screen (Configuration Menu) you can specify the time before Automated Attendant uses the No Port step in its menu to specify a command that sends a call to another Routing Table step, sends call to a Group, or transfers a call to an extension if all Voice Ports are in use. Refer to Group Configuration, Routing, for more details.

**Print Report**

On the Report/File Maintenance screen, you can print a Report that has been generated previously to a file.

**Printer Configuration**

On the Printer Configuration screen, you can select a different printer for use than the default. If a different printer is to be used, make sure all field information has been completed properly and that the printer cable and ACD Security Key device are used to connect the new printer. Call Technical Support if there are any concerns in configuring a different printer.

**Priority**

On the Group, Line, Destination Number, Originating Number, and Caller Directed Routing configuration screens, you can specify a priority (1-10) for a line. If, for example, a Line is given a priority of 1, then calls for that line will be handled first.

**Process Data**

Before a Report can be generated, Data Archived, or Data Purged; the data must be processed. On the Reports Menu, select Process Data and complete the field information necessary to process current call data.

**Programmable Memory Keys**

The Norstar station sets have memory keys that can be programmed so the Agent and Supervisor can perform functions.

**Prompted Categorization**

On the Group Configuration screen, you can specify whether or not an Agent is required to enter a category code after completing the call. This only applies when the Call Categorization feature is used and the Wrap Duration is set to AUTOMATIC or MANUAL.

**Purge Data**

In Maintenance you can delete processed call data from the database.

# R

**Reconfigure**

On the Voice Port Configuration screen, the Reconfigure button updates any saved changes made on this screen. After changes are saved, select Reconfigure by highlighting Reconfigure and pressing ENTER/CLICK, or by pressing the ALT R keys simultaneously.

**Record Call**

On the Norstar station sets, an Agent can use this function to record a call. Once the call is answered and the Record Call feature invoked, do not press any keys on the station set or the recording will terminate.

**Record Call Reserve Ports**

On the Voice Port Configuration screen, you can reserve one or more ports for recorded calls.

**Recorded Announcement**

On the Recorded Announcement Configuration screen, you can add or update a Description to a previously Recorded Announcement.

**Recorded Calls**

In Maintenance, you can view all Recorded Calls, or delete a Recorded Call. The Recorded Call Maintenance screen displays: Agent ID, Call Number (assigned by ACD), Date, and Time for each Recorded Call.

**Recording (Voice Port)**

At the bottom of the System and Group Status Display screens, all Voice Ports are listed in their current states.  For example, a Recording Voice Port is currently recording an announcement.

**Register**

On a Norstar Station Set, a Supervisor must use this function to register into the system to perform other functions.  A Supervisor can Unregister using the same steps to Register.

**Replay (Routing Command)**

This is an Automated Attendant Command that allows you to replay the Announcement.  Refer to Group Configuration, Routing section in this Guide for more details.

**Reports**

This menu enables you to select a Report and run (generate) Report to an output device.  You can also Schedule a Report for generation, and utilize the Report/File Maintenance feature to view, copy, move, print, or delete a Report that has been generated to a file.

**Report/File Maintenance**

In Report Generation, you can select Report/File Maintenance and perform the following functions for a report that has been generated to a file: view, copy, move, print, or delete.

**Report Parameters**

On the Schedule Reports screen, in Report Generation, you can schedule a report to generate.  When you first display the report to schedule, you have the option to change the Report Parameters previously specified for the report.

**Report Style**

On the Agent Profile, the Agent Profile by Group, and the ACD Call Profile Reports; you can specify a Report Style or method.  For Agent Profile, there are 3 styles: ACD Duration (time interval), ACD Percent, and Non-ACD Duration.  For Agent Profile by Group, there are 2 styles: ACD Duration and ACD Percent.  For ACD Call Profile, there are 2 styles:  ACD Duration and ACD Count (number).

**Restore Archived Data**

In System Maintenance, you can restore data to the database that were previously archived (copied) from database to floppies.  You will be using the same Archive Disks to restore.

**Retrieve Message**

On the Norstar station sets, a Supervisor can enter a feature code and use this function to view one or all of the messages.

**Return**

On the ACD Control Menu, you can select Return to exit the ACD Control screen and return to the Main Menu.

**Round Robin**

On the Group Configuration screen, you can select Round Robin from the Method of Selection list.  This is a method of routing calls to the Agent who is the next available Agent starting with the last Agent logged in. Refer to this Glossary for a definition of Longest Idle and Top Down.

**Route Order Configuration**

You can specify the order that ANI, DNIS, and CDR matching tables are looked at to route a call to the appropriate Group.

**Routing (ANI/ICLID)**

On the Originating Number Configuration screen you can specify whether you want to route calls to a Group or CDR Table.

**Routing (CDR)**

On the Caller Directed Routing Number Configuration screen you can route calls to a specified Group.

**Routing (DNIS/DID)**

On the Destination Number Configuration screen you can specify whether you want to route calls to a Group or CDR Table.

**Routing (Line)**

On the Line Configuration screen you can specify whether you want to route calls to a Caller Directed Routing Table, Destination Number Group, Originating Number Group, or to the Group assigned to this Line.

**Routing Commands**

On the Routing subscreen (Group Configuration), you can specify the commands an incoming call must follow (in steps) for the specified Group. You can specify Day and Night Routing Commands. Day Routing Commands correspond to the Routing Hours that were configured, and the Night Routing Commands to all other hours.

**Routing Hours**

On the Routing subscreen (Group Configuration), you can specify the operating hours for each Group. ACD uses Day and Night Routing Commands to handle calls for each Group. The hours specified on this screen are for Day Routing Commands; all hours not specified are for Night Routing Commands.

**Routing subscreen**

On the Group Configuration screen you can display the Routing subscreen to specify a Group's Day or Night Routing Hours and the Routing Commands/Values to route calls arriving at your call center. Refer to the Group Configuration section in this Guide.

**Routing Table Profile Report**

This Report provides details of routing table usage. The Report displays: Step Number, Routing Command, and value for Day and Night Routing Tables, and number and percentage of all calls reaching each step on the table.

# S

**Save**

On Configuration screens, you can Save new or changed configurations by pressing the F10 key. Once the information is saved for either Agent, Group, or Supervisor Configuration, you can use the Update Configuration, Maintenance, feature to activate, schedule, or defer changes. If changes are deferred, a message will display on ACD screens reminding you that the changes are pending activation or scheduling for activation. You can also highlight the Save button and press ENTER/CLICK, or press the ALT-S keys to perform a save.

**Schedule Changes**

On the Update Configuration screen (Configuration Menu), you can schedule the configuration changes saved for Agent, Group, Line, Emergency Group, and Supervisor Configuration. You also have the option to activate changes immediately. When scheduling, you must enter a schedule date and time and then save the schedule. Refer to the Reports chapter in this Guide for more details.

**Schedule Date** - refer to Schedule Changes in this Glossary.

**Scheduler**

On the Scheduler screen, Reports Menu, you can schedule any ACD Report for generation.  You will name the schedule (Macro Definition), enter a schedule date and time, and you can also change the Report Parameters before saving the schedule.  Purge Data  (Maintenance) can also be scheduled.  You can also schedule Process Data (Reports Menu).

**Schedule Time** - refer to Schedule Changes in this Glossary.

**Set Priority**

On the Routing Commands configuration screen, you can use this Routing Command as a step to re-prioritize a call so that it gets distributed and moved up closer to the beginning of the queue.

**Shutdown**

On the ACD Control Menu, you can select Shutdown to stop all running programs on the system so you can turn off the Applications Module.  Before selecting Shutdown, you must first Deactivate Call processing.

**Silent Monitor** - refer to Monitor Call in this Glossary.

**Single Line LCD**

On the Norstar model M7208 station set, there is a single line liquid crystal display that provides only one line of information to an Agent.  On Two Line LCD's (Models M7324 & M7310/M7410) there are 2 lines of information and softkeys below to execute commands and navigate through functions.  To execute commands and navigate for a single line LCD, you must use the keypad  Rls, #, and * keys.

**Softkeys**

On the Norstar models M7324 & M7310/M7410 station sets, there are 3 softkeys below the Two Line LCD.  These softkeys enable you to execute commands and navigate through functions (e.g., EXIT, OK, NEXT, etc.).

**Station Sets**

Refer to this Glossary for definitions of T7316, T7208, T7100, M7208, M7310, M7410, M7324, C3050, and C3060 Norstar Station Sets.  Also refer to analog Station sets in this Glossary.

**Status Display**

From the Status Menu, you can view the status of the system (all Groups), or the status of one group.  The call processing statistics displayed are in real-time and reflect the current performance of all Groups, all Agents, and Voice Ports.  Refer to this chapter for a detailed description of all call processing statistics.

**Step**

On the Routing subscreen (Group Configuration), you can select a Routing Command for each Step on the Routing Command Table.  When a call comes in, it must route through these steps until it is answered.  You can specify Routing Commands for 16 Steps (maximum).  On the Routing Table Profile Report, this report field (column) displays the Steps used for the Routing Table.

**Supervisor Configuration**

On the Supervisor Configuration screen, you can add, update, or delete a Supervisor.  When adding or updating, you can assign Groups to the Supervisor.

**Supervisor Functions**

On the Norstar Station Sets (T7316, M7310, M7410, M7324, C3050, and C3060), you can perform the following functions: Register, Retrieve Messages, Announcement, Announcement Maintenance, Monitor Call, Play Call, and Emergency Routing.

**Supervisor Help**

On the Norstar stations sets, an Agent can request help from a Supervisor while on a call.  On the Agent Profile, Group Profile, and Agent Profile by Group Reports, this report field (column) provides the number of Supervisor Help requests from the Group.

# Glossary

**System Configuration Report**

This report displays all configuration information to provide: an analysis tool so Technical Support can quickly understand your system, and as a reference tool so you can view the entire setup of your system.

**System Reports**

There are 5 System Reports that can be generated:  ACD Call Profile Detail Report, ACD Call Profile Summary Report, Monthly Summary Report, Abandoned Call Report, and System Configuration Report. Refer to this Glossary and User Guide for Report definitions.

**System Statistics (Wallboard)**

On the Wallboard Configuration screen, you can specify the type of  System Statistics you want to calculate.  Refer to the section in this Guide for more details, formulas, and examples.

**System Status Display**

You can view the real-time call processing statistics for all Groups.  You will be able to monitor total Group performance and identify problems as they occur.

**System Wide Parameters**

On the Configuration Menu, you can display the System Wide Parameters screen where you can specify the following: ICLID Delay Time, Login/Logout DN, Available/Unavailable DN, Indicator FlashRate 1 and 2, Digit Timeout, Port Timeout, and Display on Station Set.  Refer to the section this Guide for more details.

# T

**Telephone Service Factor (T.S.F.%)**

The Telephone Service Factor is the percentage of calls answered within a Threshold period (in seconds) for the TSF Interval (in minutes).  You can specify the TSF Threshold and Interval (Group Configuration screen).  For example, during a 30 minute interval how many calls were answered within a 60 second threshold (from first ring to answer).

**Time**

For several reports you can specify a From and Thru Time for reporting.  Refer to Common Report Parameters.

**Time in Seconds and Block #**

On the ACD Call Profile Detail and Summary Reports, this report field (column) provides the number of seconds specified for a column (15 blocks of time).  Each block of time displays the number of calls abandoned, picked up or disconnected, and transferred within its time interval for each 30 minute time period for the Detail report and for each day for the Summary report.

**Time Period**

On the ACD Call Profile Detail Report, this report field (column) provides 30 minute time periods within the From and Thru range where calls are profiled as to being abandoned, picked up and disconnected, or transferred.  The time periods are in ascending order (earliest to latest).

**Top Down**

On the Group Configuration screen, you can select Top Down from the Method of Selection list.  This is a method of routing calls to the first available Agent closest to the top of the Agent Selection list found in Group Configuration.

**Transfer DN**

On the Group Configuration screen, you can enter a Transfer Directory Number used to transfer calls to the group.  This is a non-physical Norstar DN.

**Transfer To**

On the Routing subscreen (Group Configuration), you can use this Routing Command as a step to transfer a call to a Norstar DN.  You must enter Directory Number in the Value field.

**Troubleshooting**

This Appendix 2 describes a few problems you may encounter installing and using ACD. Solutions accompany the problems listed.

# U

**Unavailable**

On the Norstar station sets, an Agent can use this function to go unavailable and not receive any ACD calls until Agent goes available using the same steps. On the System and Group Status Display screens, you can view number of Agents for each Group, or one Group, who are currently unavailable. This includes Agents indicating manually their unavailability, and Agents on Non-ACD Incoming, Outgoing, and Intercom Calls.

**Unavailable Manual**

On the Agent Profile and Agent Profile by Group Reports, this report field (column) provides the amount of ACD Time, or percentage of time, Agent was inactive for each Group during specified time period; and, pressed the Unavailable button to go unavailable.

**Unavailable Other**

On the Agent Profile and Agent Profile by Group Reports, this report field (column) provides the amount of ACD Time, or percentage of time, Agent was inactive for each Group during specified time period because of time spent on Non-ACD Calls.

**Unused (Voice Port)**

At the bottom of the System and Group Status Display screens, all Voice Ports are listed in their current states. An Unused Voice Port designates that this port is unavailable for use or does not physically exist.

**Update Configuration**

On Configuration screens, you can Save new or changed configurations by pressing the F10 key. Once the information is saved for either Agent, Group, Supervisor, Line, or Emergency Group Configuration, you can use the Update Configuration (Configuration Menu) feature to activate updates immediately, or schedule update changes at a later date.

# V

**Value**

On the Routing subscreen (Group Configuration), you can select a Routing Command for each Step on the Routing Command Table and then enter the Value (if required) for the Command. When a call comes in, it must route through these steps until it is answered. You can specify Routing Commands for 16 Steps (maximum). On the Routing Table Profile Report, this report field (column) displays the Values for the Commands used for the Routing Table.

**View Report**

On the Report/File Maintenance screen, you can view (F9 key) a report on screen that has been generated previously to a file.

**VMAIL XFER**

On the Group Configuration screen you can display the Routing subscreen where you can use this Routing Command to transfer a call to a specified mailbox in the Norstar Voice Mail application (e.g., StarTalk). Refer to the section in this Guide for more details.

**Voice Port Activation**

This ACD Option is used to increase the number of authorized Voice Ports in 2 port increments. For more information contact your Distributor or a CINTECH Support Technician.

**Voice Port Configuration**

On the Voice Port Configuration screen, you can add or update Voice Ports reserved to play Recorded Calls.  Once updating the Record Call Reserve Ports, you must Save and Reconfigure this information.

**Voice Ports States**

At the bottom of the System and Group Status Display screens, Voice Ports states are displayed.  There are 8 Voice Port states: Configuring, Idle, Recording, Playing, Waiting, Initializing, Disabled, and Unused.  Refer to this Glossary for a definition of each state.

# W

**Waiting (Voice Port)**

At the bottom of the System and Group Status Display screens, all Voice Ports are listed in their current states.  A Waiting Voice Port is currently in use but holding for user intervention, to play an announcement, or for an ATA to clear.

**Wrap**

On the System and Group Status Display screens, this call processing statistic provides the number of Agents currently in wrap for each Group, or one Group.  On the Agent Profile and Agent Profile by Group Reports, this report field (column) provides the amount of ACD Time, or percentage of time, Agent wrapped-up between calls for each Group during the specified time period.

**Wrap Duration**

On the Group Configuration screen, you can select 1 of 3 ways to specify the length of wrap time allotted to an Agent between calls:  AUTOmatic, MANUAL, and NONE.  If Automatic is selected, you will also have to specify a cancel wrap time period.  If MANUAL is selected, the Agent must use the Cancel Wrap feature code to cancel wrap.

# Y

**Year**

On the Monthly Summary Report, this report field (column) provides the year for the month on which you want to report.  The default is the current year and month.

**YES-CALC ALL GROUPS**

**YES-CALC SELECTED GROUPS**

On the Wallboard Configuration screen you can specify whether you want to calculate System Statistics for all of the Groups for your call center, or just the Groups you specify on this screen.  Refer to the Wallboard Configuration section in this Guide for more details, formulas, and examples.

# Index

# Index

# Index

# Index

### E

EDIT softkey, 90
Emergency Configuration, 63
Emergency Routing, 102, 115
EMERGENCY ROUTING, 126
Emergency Routing Feature Code, 115
Emergency Routing Key, 115, 116
END TIME, 149
Exception Group, 55, 57, 58
Execute, 181, 182
Export, 174
Export Data, 167, 173
Export Data Record Formats, 197
Export File, 164

### F

Feature button, 87
Feature Codes, 87, 120
Features Codes, 125
Field Name, 197
Field Number, 197
File Name, 131
First Name, 28
flash speeds, 70
Force Categorization, 30, 98
FORCED ANNOUNCEMENT, 37
Forced Categorization, 68
Form Feed, 78
Format, 79
From and Thru Ranges, 131
From/Thru Rules, 131
Full Handsfree, 93

### G

GO TO STEP, 35, 37
Group, 45, 47, 48, 50, 52, 54, 59, 63
GROUP, 35, 37, 149
Group Assignment, 61, 62
Group Configuration, 30
Group Description, 63
Group Number, 30, 31
Group Overflow Report, 129, 140, 142
Group Profile Report, 129, 140
Group Reports, 129
Group Status Display, 120, 121
Group/Description, 63
Group's Statistics, 80

### H

Handset, 93
Handsfree Mute Key, 93

# Index

# Index

### R

### S

# Index

Unavailable Key, 94
UNAVAILABLE MANUAL, 134, 136
UNAVAILABLE OTHER, 134, 136
Unregister the Supervisor, 104
Unused, 121, 124
Update a Description, 65
Update Configuration, 25, 74
User Input Timeout, 54, 57

## V

VALUE, 143
View Report, 163
VMAIL XFER, 38
Voice Port, 67
Voice Port States, 121, 123

## W

Waiting, 121, 123
Wallboard, 79
Wallboard Configuration, 79
Wallboard Displays, 80
WARNING, 187
Wildcard, 50, 54, 59
Wrap, 121, 123
WRAP, 134, 136
Wrap Duration, 30
Wrap Type, 30, 32

## Y

Year, 158
YES-CALC ALL GROUPS, 79
YES-CALC SELECTED GRPS, 79
Your ACD Product ID, 126